

Welcome to eVA's "Security Basics"

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July 2003

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Security-1

Estimated time for class: 3 hours.

This course is intended for eVA COVA Entity Security Officers, Purchasing Directors, and agency team leaders.

The presentation has been posted in multiple formats.

PDF: The PDF version contains the slide and related notes for each slide.

PowerPoint: The presentation was developed using PowerPoint XP – It can be view using earlier versions of Powerpoint, but the animation contained on the slides will not be what is represented on the XP version.

Web Viewer: If you view the presentation on the eVA Portal – all Animation will be removed. In addition – it will be easier if you increase the window for Notes.



When you complete this training, you should:

- **Understand How Applications are Related**
- **Identify key eVA Risks & Mitigations**
- **Understand your role in eVA Security**
- **Evaluate User Configuration & Access**
- **Know how to process Security Requests**

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Security-2

To effectively manage security you need to have a basic understanding of how eVA applications are configured and relate to each other

Understanding eVA risks will assist you in understanding some of the provisions contained in the security manual.

We will review key aspects of the Security Manual with emphasis on Agency responsibilities

Although this course is not intended to provide a complete understanding of application configuration options, we will look at key implementation decisions – how they increase or decrease application risk and how they affect security.

Then we will move on to the details on procedure including changes to the security request process.

Security: Class Schedule



- **Overview of eVA Portal & eVA Applications**
- **Risk & Mitigation Strategies**
- **eVA Security Manual Highlights**
- **Break**
- **How to Access Required Information**
- **How to Submit & Approve Security Requests**

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Although this is a self-study course and therefore you may stop at anytime, it is suggested that you complete the first two section at the same time. The two sections are closely related.

You will also need the eVA Security Manual – the manual is available on eVA under Reports & Documents – It is on the Agency Security Tab.

Key User reports are also required. You may access them on the Agency Security Tab referenced above

The presentation demonstratea where they are and how to access them.

If you do not have an eVA user id – Please contact your Agency Purchasing Office or you eVA Security Officer

- **Portal:** Electronic gateway for Vendors and Buyers
- **COVA Entity :** Any Virginia Public Body
- **COVA Entity Head (CEO):** Agency Head, Director, Commissioner, Department Head – The Top GUY or GAL at your organization!
- **Global eVA Security Officer:** eVASecurity@dgs.state.va.us Responsible for overall eVA security
- **COVA Entity eVA Security Officer:** Individual designated in writing by the COVA Entity CEO to administer Entity Security
- **AE:** DPS Account Executive assigned to your Entity. The AE assists in configuring eVA, training, and problem resolution.
- **DPA:** Delegated Procurement Authority The amount of a purchase you are authorized to make without Entity Purchasing Office Signoff

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The item in () indicates the Security Manual reference and beginning page number. You may want to have the security manual available for reference.

These terms are used throughout this course and in the eVA security manual

Portal: eVa is an Internet application – all applications are web based

COVA Entity: Used to represent agencies, universities, etc because eVA is used by both state and local government, executive, legislative, and judicial branches.

COVA Entity CEO – This is the individual that is ultimately responsible for the information security program for your institution. For Universities, this may be someone below the President – a Vice President or Dean responsible for administrative processes in your institution.

Global eVA Security – The policy setting responsibilities for security will eventually move to VITA – once the organization is sufficiently established and knowledgeable about eVA

COVA Entity Security Officer – Individuals designated to eVA security in writing – to be responsible for eVA security in your organization.

AE – Employees in the division of Purchases and Supply that assisted your Entity to configure eVA. They conduct training and provide support for eVA. They are also responsible for reviewing your security requests

DPA – As used in this course it is the amount an eVA user may purchase without the requisition being reviewed by the Entity's purchasing office

- **Permission:**
A role that provides access to eMail data or functions not granted to all users. Permission roles begin with "eVA".
- **Role:**
An Entity defined category associated with approval rules, access to reports, or permissions.
- **Data Source:**
Access to data warehouse information based on the view of the data or Entity code. DMreports is a data source that provides a view of user profile and other configuration data. A152 is a data source that restricts the view of purchasing data to a specific Entity's purchase transactions (Agency 152). COVABASE is a datasource that provides a view of all purchase transaction data.
- **Reporting Group:**
A grouping of Reports & Documents report tabs. Reporting groups provide access to reports and documents posted on eVA.

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Security-5

Now we will review some of the technical terms

Permission: All users that have access to the email – may create a requisition. Users may on see requisitions that they create or approve. If a user needs to see all requisitions – this would be a permission.

Role: Primarily used to direct workflow.

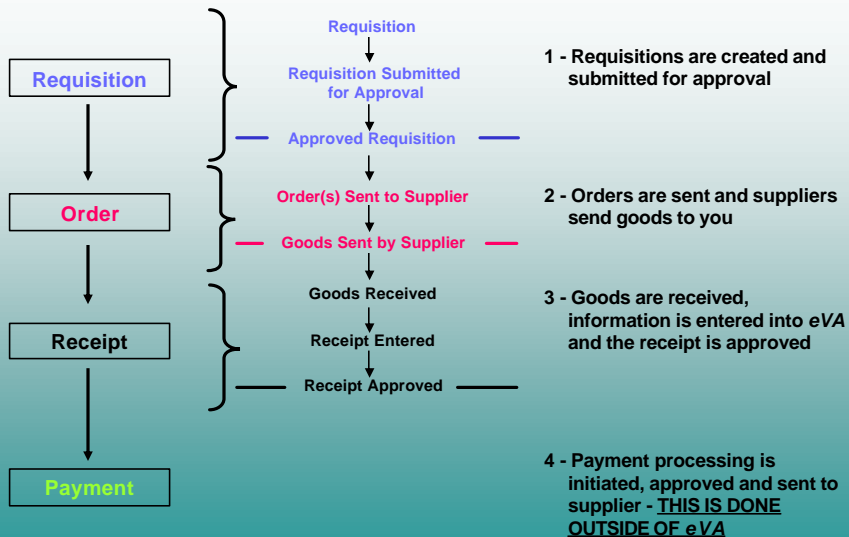
Data Source: Access to reports is under the Reports and Documents URL. To successfully run a report you must first have access to the data used in the report. A data source grants a user access to data warehouse data. Entity data sources – or views of data – are named for the Entity. A – for agency (state government) L for local government. For state government the number is your Agency Code as assigned by the Department of Planning & Budget. For local government it is an assigned number.

Reporting Group: The second access grant required to run a report. Reports are published to Reports & Documents pages – A group of pages form a reporting group.

eMall Order Process



Four major steps in the eMall Order process



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For those of you not familiar with eVA or purchase processes this slide DESCRIBES the overall process within the eVA email from requisition through payment.



Requisitions:

- All orders in eVA begin with a requisition
- Requisitions are approved and become orders. There is an established approval process for your requisition which is based on your COVA Entity's policies and procedures. This approval process is incorporated into eVA as approval workflows.



Order

- Once Approved, a requisition becomes, one or more Orders. Orders are electronically sent the the vendor. Goods or services are then delivered back to the Entity.



For Receipts

- Once the goods are received, receipt information is input into the system
- The receipt information may also go through an organization-specific approval process if this has been set up by the agency. Generally this is expected to be used for items and materials (i.e. computers, hazardous materials, etc.) that require more than just the receiver to be notified of the receipt of the materials.
- This happens whether individuals do the receiving (desktop/decentralized receiving) or all goods are received at a central location (central receiving)



For Payments – approvals for payment are not part of eVA. Approvals for payment will be processed basically the same as today.

eVA Application Overview

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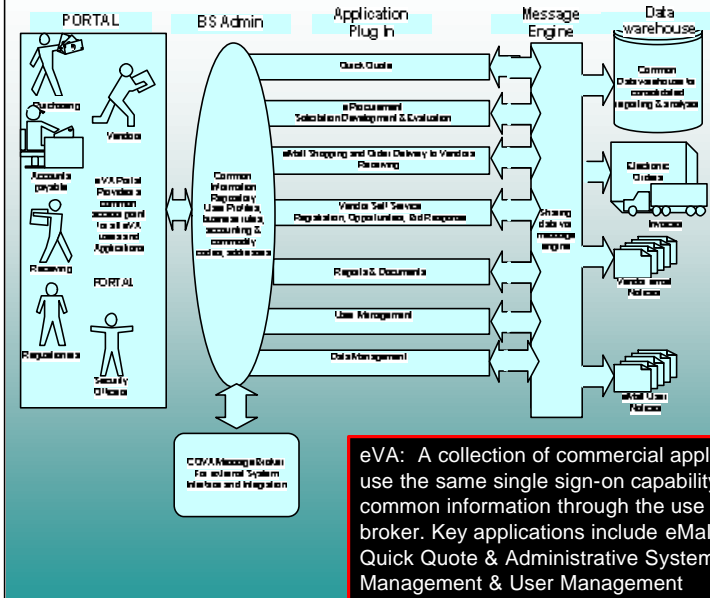
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eVA Application Overview: Estimated time for this module 20 minutes

As I begin this section – listen carefully and write down or take a mental note of the risks that might need to be managed either by the application or through policy.

Security: eVA Applications



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Beginning from left to right

Portal: The Portal is the front door to eVa. All users buyers, security officers, or vendors use the go through the Portal to access eVa. This is where user authentication is performed.

BS Admin: BS Admin or buysense repository is the common information repository for all user and Entity configuration data. The repository is used to provide user and Entity specific configuration information to the individual applications that comprise eVa.

Application Plug In: eVA is actually a collection of commercial applications modified to use a common user sign-in process and accept required configuration data from the BS Admin repository.

Message Engine: The message engine is a product that moves data among eVA applications, sends orders to vendors, receives external orders from Entities, and sends data Nightly to the eVA data warehouse. The message broker also generates emails to eVA users to inform them of needed eVA actions like requiring an approval flow.

eVA is a service offering provided by American Management System (AMS). Virginia does not own or operate the data center, hardware, or software. The service is offered to other AMS customers. eVA is the Virginia branding of AMS' buysense solution. Because of this, we can influence software development, but cannot mandate it. All data within the eVA solution is owed by Virginia.

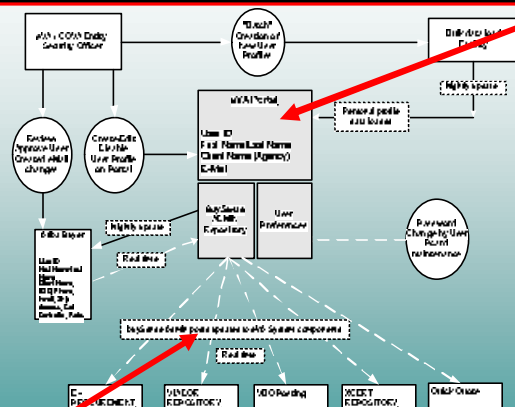
TRANSITION...

Now let's look at eVA from a different perspective.

Security: eVA Applications Share User Information



User Profile information is loaded using the Portal application User Management which updates a common user security repository called Buysense (BS) Admin



eVA Applications: User Profile Information is used to define roles & data access permissions for eVA system components like e-Procurement Viador (Reports & Documents), VBO, and Quick Quote. User Management changes are effective IMMEDIATELY upon entry into User Management

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This slide provides a schematic view of eVA.

(click to display text) Again we start at the eVA Portal in the center of the application.

Using **User Administration applications**, the security officer creates or modifies user information. This information is stored in a common repository – the buysense Admin (BS Admin) repository. From here, any user information - demographics, roles, permissions, are used to populate the individual configuration profiles of the applications we just discussed.

(click to display text) **Portal applications** displayed at the bottom of the screen – are updated IMMEDIATELY! These applications include e-procurement, quick quote, Virginia Business Opportunities (VBO), Reports & Documents (Viador), xCert.

You will notice throughout this course that many terms are used to represent the same application. For example Viador is the product used to provide Report & Document access (the name used on the Portal menu). If you need to assign a user access to Viador you will assign them Analytic Reporting. When you review user management reports – applications reference the application name used within user management. Your notes and the security manual contains a complete cross-reference list of application names.

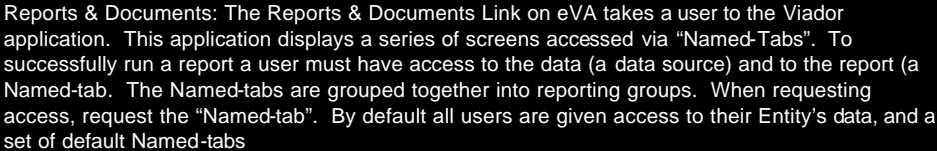
The **XCert repository** assigns a digital certificate to every user -

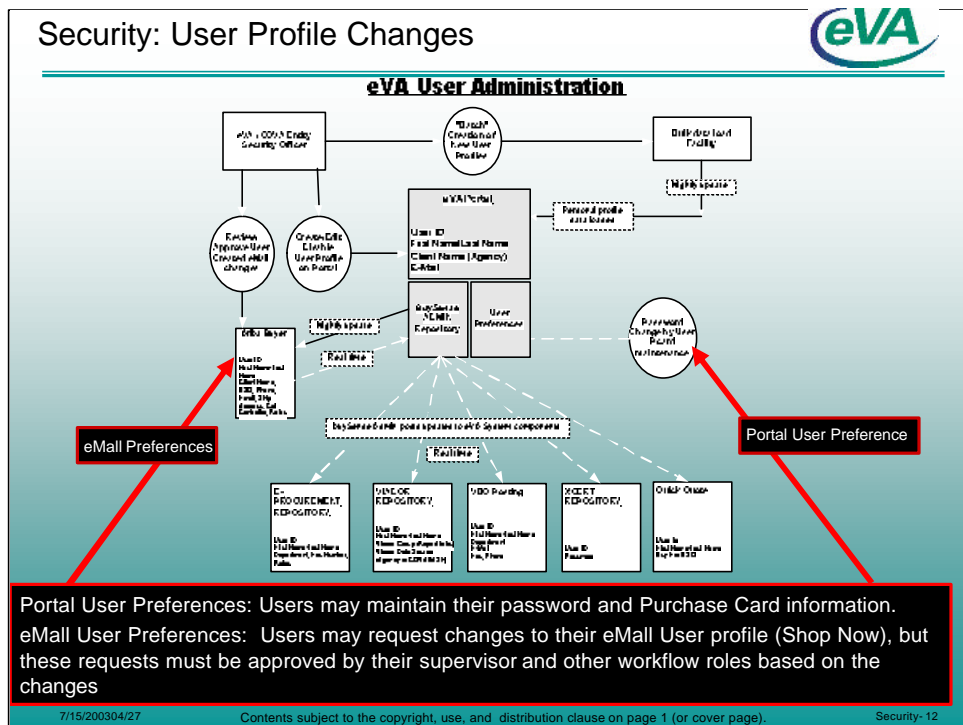
the user accesses their digital certificate via their user id and password. This digital certificate creates a session id cookie that is written to the user's PC. For IE 6.0 users – third-party cookies must be enabled for the application to work properly.



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Again – you will notice I use three words to mean the “shop now” link. Shop Now which is what the user sees on the menu, eMall which much of the documentation uses for online ordering, and Ariba which is what is assigned during user management. Reports will list Ariba.



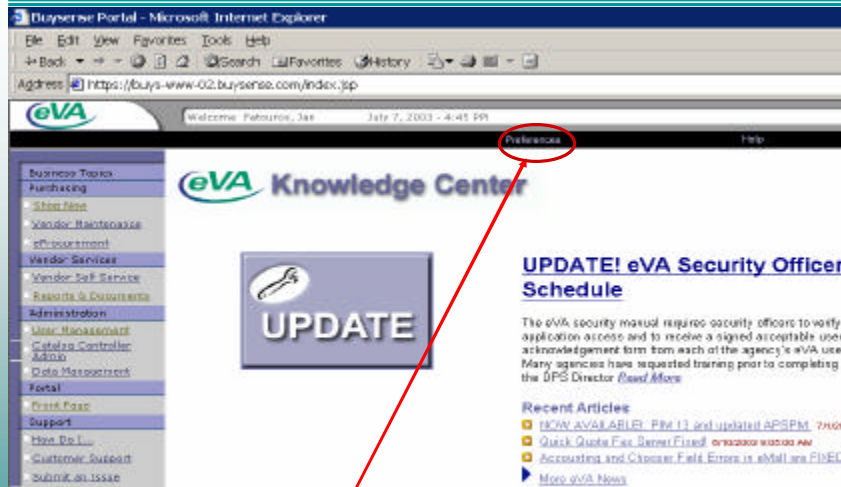


I have reviewed several inconsistencies in eVA setup, well user preference's is one place where AMS was consistent. There are two locations when users may change user information. They are both labeled Preferences, unfortunately depending on which Preference you choose, different options are available.

Portal User Preference (This URL is located at the top of the eVA portal (the screen immediately following the buyer login) It is located on the black menu bar. From this link you may change your email address, your password, or maintain your purchase card information. eVA security authenticates password reset requests by matching the email address from the request against the user's email address in eVA. Changes made at the portal do not require approval.

eMail Preferences: There is also a preference link on the black menu bar on the eMail "swoosh" screen. This options allows you to change your password, user profile (all the email security rules), and to delegate your signing authority.

Security: eVA Portal User Preference



Preferences: Users change their password and Purchase Card information by accessing the Preference Link on the black menu bar at the top of the Portal Window

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This screen demonstrates how to access Portal Preferences. This is the screen immediately following the buyer login screen.

Security: eVA Portal User Profile



Portal Profile: Users change their email, password and Purchase Card information
Portal Preference changes do not initiate an approval flow.
These changes do appear on user security reports.

Passwords must be 4 characters – but the manual will require them to be increased to 6 characters. Passwords do not require mixed case, numbers or any other hardening. It is recommended that although not enforced by the application that users use hardened passwords. The application will allow users to “toggle” their passwords. Again, it is recommended that the agency require users to vary their passwords.

Purchase Card Maintenance: Purchase card holders may enter their purchase card numbers in eVa. They may also assign access to their cards to other users. This is against the AMEX agreement, therefore you need to monitor purchase card assignment to ensure policies are followed.

Why would we have this capability? Remember many organizations including local governments use the application. Many local governments use different credit cards with different restrictions. Some governments have one number for particular purchases and all purchases for the commodity are made against the same card. Some federal grants are also managed via a common card used by grant participants.

Note: User IDs are set by AMS by formula – First Initial of the First Name, Six Characters of the Last Name, then a number for uniqueness. User IDs are never reassigned.

Security: eVA eMail User Preferences



Preferences: Users request changes to their eMail Profile by accessing the Preferences Link on the black menu bar at the top of the Shop Now (eMail) Window

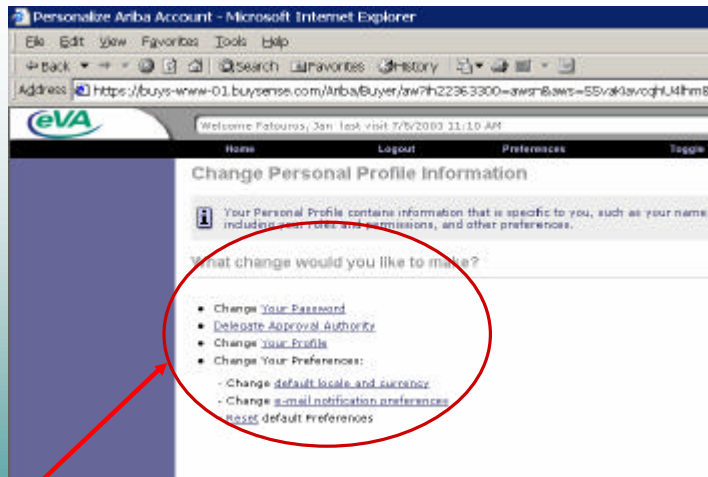
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This screen is the first screen immediately following the ShopNow link. It is referred to as the “swoosh” screen. Given the label – Preferences and the similar location – the top Black menu bar – getting users to understand how to access profile changes.

From this Preference Link the user may change their password which does not require an approval.



Email Preference Options: *Change Your Password*, *Change Your Preferences* options do not require an approval

Delegate Approval Authority & *Change Your Profile* ALWAYS require the user's supervisor's approval and many times additional approvals

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Delegate Approval: This link allows the user to designate an individual that can approve requisitions for them. This is convenient when staff go on vacation, but users need to understand that delegation is just like handing someone their signature. For example: Jan delegates approval authority to Sue. When Sue logs-in to eVa Shop Now she will be asked – do you want to be Jan or Sue. If she selects Jan she can only see requisitions or receiving documents that Jan must approve. When Sue approves a requisition “as Jan” the approval box and history appears as if Jan approved it. It is Jan’s login id that is used. From the user’s perspective – you have no indication that the requisition was approved by someone other than Jan. This is very important – if you are investigating fraud or other misuse issues. Although not displayed, the actual user id is stored in the bowels of the application. If you must know contact eVA security and we will request a data extract from AMS. Delegation requests must be approved by the user assigned in the supervisor position.

Sue cannot create a requisition as Jan or perform other functions that only Jan can do.

Your Profile: This is the section that allows users to request changes to their workflow, roles, and purchasing limits. All profile change requests must be approved by the supervisor. In many cases the request must be approved by others. eVA security officers are inserted in the approval flow when roles are changed. Profile requests do not become effective until fully approved.

Security: Self Study Questions



The common access "front door" for all eVA applications is called _____.

Permissions grant _____ & _____ not available to all users.

Common User information is shared among eVA applications from the _____ repository.

Portal User Management updates to Ariba (eMall) are different from updates to other eVA applications because _____.

To access reports requires assigning both a _____ and a _____.

Users have _____ different locations to change user profile or preference information.

User requests to change profile information started in the eMall must be fully _____ before becoming effective.

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(the Portal)
(data access, functions)
(Buysense (BS) Admin)
(they require an over-night or batch process)
(data source, reporting group)
Two
(supervisor)

Risks & Mitigation Strategies

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Estimated Module Time: 20 minutes

Begin by identifying the risks you noted in the previous section

Now review the risks that the security workgroup identified

Some of these risks are mitigated by application configuration choices other must be handled with policy and post event review and monitoring

Security: Risks & Mitigations



Risks	Mitigations
<ul style="list-style-type: none"> Ordering of Goods or Services <ul style="list-style-type: none"> Order not needed/authorized by Agency Order converted to personal use Order costs incorrectly charged 	<ul style="list-style-type: none"> Ordering of Goods or Services <ul style="list-style-type: none"> Workflow provides for multiple approvals Shipping & Billing Addresses are pre-defined Value-based workflow allows for cost center approval eVA Administrators & Security Officers not last approvers Catalog Controllers restrict what can be ordered & Catalog purchasing reduces errors
<ul style="list-style-type: none"> Purchase Card Management <ul style="list-style-type: none"> Purchase card numbers are stored on eVA Purchase card data is self managed Purchase cards available to others during On-Behalf of Ordering 	<ul style="list-style-type: none"> Purchase Card Management <ul style="list-style-type: none"> Purchase card numbers are stored encrypted Configuration reports identify Purchase cards and authorized users On-Behalf of Ordering creates Pcard holder as a watcher
<ul style="list-style-type: none"> eMail security is self-managed <ul style="list-style-type: none"> May request changes in purchasing authority May request changes in approval flow 	<ul style="list-style-type: none"> eMail security is self-managed <ul style="list-style-type: none"> Request always requires supervisor approval Triggers other approvals based on request

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The work group organized risk into key subject areas. Let's begin with concerns about orders.

-Unauthorized Orders. Key application features that reduce unauthorized or incorrect ordering include the Catalog Controller which limits access to catalog items to those the user is allowed to purchase. There are **three levels of workflow approvals** that may be used to prevent unauthorized purchases. First each user has a personal approval amount and approver – The User profile expenditure limit and expenditure approver. This approval will be generated whenever a requisition is created by the user or “on behalf” of the user. The buysense Org or Group Profile assigned to the user defines group workflow approvals to be initiated. This workflow is based on the value of the requisition, or the commodities that were requested. There is also an Entity-wide workflow option called a signer rule- This workflow is based on data values entered on the requisition header or on the accounting screen. For example at DGS cost center managers are responsible for their budgets. By policy a cost center manager must approve all expenditures against their budget. We handled this policy by establishing a signer rule for the cost center field. Now – whenever a user in DGS enters cost center 102 (my cost center) a workflow approval box for my approval is created.

Orders Converted to Personal Use: The key control after at approvals is control of shipping and billing addresses. When we started eVA the rule was all shipping & billing addresses must be entered in eVA. For large organizations this became difficult – some insisted impossible. While I still believe that it is not unreasonable to require all addresses to be entered. For example in a university – all building addresses could be entered. To direct the shipment to a particular location within the building – the “Deliver to” field on the requisition could be used to identify Person, floor, and Room location. But given how adamant purchasing offices were – we finally allowed exception address to be entered. Now we have Shipping addresses that say – See comments and exception billing addresses that say See Shipping. These address will have a unique identifier with a \$ in the id. Like A194\$\$ (for shipping) and A194\$B (for billing)

Orders Incorrectly Charged: Signer rules that trigger based on accounting is one control.

Security: Risks & Mitigations



Risks

- Access to the application
 - 24 by 7
 - From anywhere in the world
- Application Shared with Others
 - Wrong Approvals
 - Others change an order
- Application Weaknesses
 - eMall access allows any user to create a requisition
 - Users may ONLY see requisitions they participate in
 - OR all eMall requisitions when given eva-queryall
 - User ID creation leads to confusion when assigning roles
 - eMall eva-edit-approval allows a user to edit any requisition they can see!
 - Application is outsourced

Mitigations

- Access to the application
 - Timely deactivation of user access
 - Required password changes (every 30 days)
 - Inactivity Timeout after 60 minutes
 - 24 by 7 monitoring & intrusion detection
 - SSL connection & digital certificates used
- Application Shared with Other Virginia Entities
 - Roles can be restricted to Entity
 - Restrict data access permissions to prevent unauthorized changes
 - Requisition changes resets approval flow
- Application Weaknesses
 - Establish an expenditure supervisor to prevent unauthorized use
 - Use the Watcher Functionality to gain access to agency requisitions
 - Restrict the use of eva-queryall (Bob Sievert must approve all assignments)
 - Verify user changes with security reports
 - Never assign eva-editapproval to users with eva-queryall or eva-nosupervisor
 - DGS retains rights to all Virginia data
 - Data warehouse fully defined & can be relocated
 - DGS monitors Vendor's account activity
 - COVA data behind firewall

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These notes apply to the previous slide.

Purchase Card Controls. In eVA there is a facility that allows anyone in your organization to create a requisition “on behalf of another person” This is helpful to purchasing offices because default accounting, shipping, and workflow are based on the attributes assigned to the user in the “on behalf of” field. In addition to these helpful items – the purchase cards assigned to the user are also made available. In fact when buying on behalf of someone – only their purchase cards are available. The “on behalf of” user is notified via an email warning message and an watcher notice in shop now that someone is buying on their behalf, but the user IS NOT required to approve the purchase. I recommend that purchase card users – use their expenditure approver within their user profile to force their approval. To do this – the User would assign themselves as the expenditure limit approver and set the approval limit at zero. If configured in this way – the purchase card holder will always be the first approver for all requisitions created on their behalf. The one draw-back is the user will also be required to approval all requisitions they create. This approval can be done immediately after submitting the requisition.

Users May Request Profile Changes: For every change a user requests a series of approvers are required. If you change anything the supervisor must approve. If you change supervisor, the old and new supervisor must approve, if the expenditure limit is changed the expenditure limit approver must approve, the expenditure limit approver changes, the old and new expenditure approvers must approve. If the DPA limit is change the DPA approver must approve. The Entity security officer and the eVA security officer must approve is roles are changed.

Lets take a minute to talk about the supervisor field.

The only function the supervisor performs in most eVA configurations is User Profile approvals. Therefore if the security officer wants to be included in all profile change requests – they should be entered in the supervisor field. In some organizations – the purchasing director has been entered as the supervisor of eVA. Another valid designation is the actual supervisor, particularly if these users are active in eVA.

Security: Self Study Questions



- List three risks and ways to mitigate the risks you identified
- Although addresses are predefined, what configuration option could undo this application control?
- How can the “on behalf” risk be mitigated?
- What additional risks are created by web-based applications?
- Why is immediate access deactivation necessary for terminated employees?

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Security- 21

Requisitions using some ones purchase card – Insert the Purchase card holder as an approver using the expenditure limit approver or a default accounting field value.

User with both eVA-query all and eVA-edit-approval permissions may change any requisitions they can access. By policy eVA Security will not authorize these two permissions for the same individual. A requisition that is modified will have its approval flow redrawn.

24 by 7 access to the application from anywhere – Timely termination of user access. AMS monitoring for intrusion detection. All purchase card information is encrypted and all transmission between buyers, vendors, and eVA are encrypted.

The use of exception addresses

Using the expenditure limit approver, using value based workflow (known as signer rules)

Potential for hacking, unauthorized access, inability to reach the application because the Internet is busy, or damaged. AMS maintains multiple paths to the Internet from the data center in Sterling VA, there is constant automated and human monitoring of the data center, all access to servers from outside and inside the data center require digital certificate authentication.

An employee may access the application from any location that has access to the Internet including libraries, their homes, airports, etc.

Security Manual

Quick Tour

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This section requires approximately 20 minutes.

It reviews the highlights of the security manual (the cliff note version)

Reminder: The references in () provides the section and page reference to the security manual.

- It is the policy of the Commonwealth of Virginia that the e-procurement solution be used only for conducting legitimate and authorized business of the Commonwealth within the approved authority level of the user and in the manner in which it was intended.
- Provides the basis for determining appropriate access
 - Only legitimate and authorized
 - Within Organization & Personal Authority Levels
- Makes all users accountable for their actions

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Basically – It does not matter if a user finds a way to exploit an application weakness – they are not allowed to do anything that they have not been authorized to do. Whatever is done and marked with their user id – is their responsibility and they will be held accountable for it.

This includes the use of delegation or sharing their user id and password

- Authorize ALL Entity security requests and keep a log of active users
- Ensure eVA users understand & adhere to policies on authorized use
 - Ensure ALL Entity eVA Users have signed the acceptable use acknowledgement & maintain a file of the acknowledgements
 - Ensure eVA user access is promptly terminated (within one business day of event)
 - Incorporate eVA into Security Awareness Program
- Conduct Quarterly reviews of eVA users
 - roles & access
- Conduct and Report annual audit of user accounts
- Develop internal processes within their Entity to meet these responsibilities

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Security- 24

Authorize All Entity Security Requests: This is a change in the existing procedures. It is expected that once a security officer is designated – that all security requests (changes in roles requested by users) and all User profile changes requested to be made by eVA security will be submitted to DPS and eVA security by the security officer.

There are many reports on eVA that meet the requirement for maintaining a log of active users. Your job is to review the log and make sure all eVA users should still have access to eVA.

Conduct Quarterly Reviews – The manual discusses regular reviews – it then states that at a minimum regular is at least quarterly. You can do reviews more frequently.

The annual review process is a quarterly review that has been certified by the CEO.

It is the Entity's responsibility to create policies and procedures to manage their use of eVA. The manual outlines minimum requirements for all installations, but it did not attempt and does not replace Entity specific policies and procedures.

- **Quarterly Review Check List**
 - ✓ Have users had a change in organizational responsibilities?
 - ✓ Have user accounts been deactivated for employees that have left?
 - ✓ Was the deactivation timely?
 - ✓ Are my "Acceptable Use" files in good shape?
 - ✓ Request purchasing assistance in reviewing the approval workflow
 - ✓ Is user approval flow appropriate?
 - ✓ Self-Improvement Report – let eVA security know if there were problems.
 - ✓ Complete & File the Quarterly User Validation Report
- **Annual Review**
 - ✓ Conduct Quarterly Review
 - ✓ Review & submit "User Profile Data Management Report"
 - ✓ Complete & have CEO certify the Annual User Accounts Report

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The quarterly review is not a point-in-time activity. We do not expect that you will attempt to conduct a complete audit on a given day. We do expect that you will establish a schedule of user review that allows you to review every user profile assigned to your organization at least once every three months.

One of the most difficult events for you to detect is a change in an employee's duties. Internal organization changes – for example a buyer in purchasing become the accounts payable supervisor. It is important that you develop a team approach to reviews. Include the purchasing officer, human resources, your network security, etc. It is vital that users that no longer need access to eVA are removed and that change in duties are reflected in approval flows.

Self-Improvement or Self –Identified Violations. Quarterly reviews need to be documented because both APA and DPS Procurement Review may request these documents during their audits. If during a quarterly review you identify a deficiency – say 10 or 12 terminations were not done timely. Then you need to document the problem and describe the actions the organization is taking to correct it. This self-improvement report should be sent to eVA security and your DPS AE. By taking quick action to correct a problem you will reduce the likelihood that it will raise to the level of a management audit point on APA's audit report.

An annual review is simply a quarterly review that is signed by your Entity CEO (that top guy or gal) and submitted to eVA security.

Security: Key Dates



- **June 15 2003**
 - Designate eVA Entity Security Officer
 - Appendix B: COVA Entity eVA Security Officer Designation
 - Also Send a Security Access Form – if designee not on eVA
- **September 30 2003**
 - First Annual Review Deadline
 - Appendix C: eVA Annual User Accounts Report
 - Acceptable Use Acknowledgements Signed by all eVA users
- **Not Later Than January 2004**
 - Conduct first quarterly review
 - Appendix D: Quarterly User Accounts Validation Report
 - At least once every quarter thereafter
- **Feb 1 2004**
 - Confirm or designate eVA Security Officer
 - Appendix C: eVA Security Officer Confirmation
 - Annually by Feb 1
- **July 1 2005**
 - Complete Second Annual Review

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By June 15 all COVA Entities were required to designate an eVA Entity Security Officer. Although most Entities should designate someone in their organization, the manual only requires the officer be a state employee. Entities may partner, particularly when attempting to resolve conflicts with security officer criteria.

Although the manual states the base-line –First Annual review was to be conducted by July 1, this date has been extended to September 30. Again, this does not mean begin on September 30 –It means begin now – and complete by September 30. Included in this initial review is the distribution and documenting that all eVA users have been provided the Acceptable User Policy. This policy and the acknowledgement form is in an appendix of the security manual. This authorization must be in writing and filed with the security officer – or if your organization has established an electronic means to distribute and document review – this is acceptable. You must be able to tie that review back to a user and the user's intent to sign the document. Having these acknowledgements on file is critical if you must enforce eVA security via disciplinary or legal means.

The next quarterly review date will depend on when you complete and submit the annual review – in all cases the first quarterly review should be completed by January 2004.

The next two dates will be aligned – Right now the manual requires recertification of the eVA security officer by the CEO in Feb – I think we will move this to July 1 along with the annual review process.

- COVA Entity Employee
- No known disciplinary actions for security related issues
- No final approval authority within an eVA workflow
- Does not have the "no supervisor" permission
- Procurement or Fiscal Directors should not be designated as security officers

No contract staff may be security officers, but it may be performed by a different state agency.

No final approval authority includes the use of a purchase card in eVA with no approvals.

The no supervisor permission allows a user to change their profile without any approvals. Security officers need to have someone as their supervisor.

This is the criteria for the basic level of security delegation at this level, security officers will not be allowed to handle their agencies user management functions.

- Memo to DPS Director
 - Criterion for which exception is requested
 - Reason why it is necessary
 - Compensating control to mitigate the risk
- Copy your Account Executive!
 - List Posted on Security Portal Page
- DPS will respond with a memo for your files!

Direct any Exception Requests to Ron Bell, Director of Purchases & Supply.
The mail information is in the manual. Ron's email is rbell@dgs.state.va.us.

Also copy the Account Executive and eVASecurity@dgs.state.va.us. A list of account executives is posted on the security tab under Reports & Documents.

DPS will approve or deny your request in writing.

- Additional Security Officer Requirements
 - Criminal Background Check
 - Additional eVa Training
 - Approved by the Global Security Officer
- Additional Entity Requirements
 - Security Plan on File with eVA Global Security
 - No material procurement or system weaknesses noted by DPS or APA in past fiscal year
- Additional Duties
 - Process password change request for delegated Entity
 - Add & Delete eVA users
 - Modify User roles and access
 - Entities may partner

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If an organization want to handle their own user maintenance – the Entity and Security Officer must meet these additional requirements.

Criminal background checks are recommended for all security officers, but only required if you will be doing your own user management. Criminal background checks are to be used by your Entity CEO – to assist in determining if you are an acceptable candidate. They are not to be sent to eVAssecurity and should be destroyed once reviewed.

It is your DPS AE that will determine if a weakness is material.

We will be conducting additional User Management training for agencies that assume user management responsibility.

All agencies are to have a security program/plan. eVA needs to become a part of your security program and your security awareness programs. In the appendix is a list of key items to include in the plan. If you have a security plan – revise it to include eVA.

As you are determining the best way to assume User Management remember you may partner with other COVA entities. Possibly user management would best be delegated on a regional basis. Corrections has decided to assume user management responsibility at the central office for all correctional facilities. If you have communities of interest, you may want to consider designated someone outside of your Entity as the Advance security officer – the security officer that can maintain user access for your Entity.

- Entity must have designated Officer & Backup that meets delegation requirement
- User Account Management Authority
 - Describes the procedure to authorize new users & changes to users
 - Describes under what conditions the security officer may deactivate an account
- Managing Employee Changes & Terminations
 - State the process to be used to notify security officers of employee changes and terminations
- eVA Security Awareness
 - Distribution & Maintenance of the Acceptable use policy acknowledgements
 - Annual actions to promote security awareness
- Review & Audit Schedule
 - Frequency of interim audits and responsible parties
 - Commitment of other managers to assist in review
- Estimate the time required for your Entity

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The slide identifies the minimum elements in the security plan that must be submitted to receive delegation of user management functions.

It is important that the plan identifies when the Security Officer may deactivate or remove a user from eVA. It is important that you are empowered to protect the system and have sufficient authority to make people listen and respond to your concerns.

Assuming responsibility for User Management is optional. DGS will continue providing this service to all agencies without user management. We ask for a estimate of time that will be required for you to perform user management tasks – to assist your management in determining if your organization has sufficient capacity to successfully handle delegated User Management.

- Include eVA in your Entity's Security Awareness Program
- Regularly review eVA's Acceptable Use Policy with users
- Send reminders not to share eVA user ids and passwords
- Promote practices that help reduce sharing passwords
 - eMail allows users to delegate approvals to others
 - Encourage the use of Approval Roles instead of user names
 - Encourage multiple users in the same role
- Promote "4 eyes" controls
 - At least two people should be involved in all eVA transactions
- Work with supervisors, fiscal, and human resources to make sure you are informed of employee terminations or changes in responsibilities
- Remind users they are responsible for all activities that occur on their account
- Remind credit card owners to regularly check who may be using their account.

Again we all should have activity Security Awareness programs – this is a reminder that the eVA needs to be included in your program.

Again key to a security awareness program is distribution and documentation that all users have had access to the acceptable use policy and acknowledge their review of the policy.

As security officers, you will not have all of the information that may be necessary to adequately provide security awareness information or evaluate user configurations. To be successful you will need to team with your Purchasing director, fiscal officers, and human resource offices.

Security: Self Study Questions



By _____ of each year the eVA Entity Security officer must file a security audit report with eVA security.

List three items that must be verified during the annual audit.

By February 1 the Entity CEO must _____.

List the duties of the eVA Entity Security Officer (see slide 20)

To be delegated User Management responsibilities – the eVA Entity Security Officer must _____, _____ and _____.

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(July 1)

(Terminated employees have been deactivated, all Users have a current acceptable use policy acknowledgement on file, user's access is commensurate with job responsibilities, at least two individuals see/approve each requisition (recommended not mandatory)

(recertify the eVA Entity Security Officer) –Although this may change to July 1 2004

(pass a criminal background check, attend eVA security training, submit a security plan to eVA security)

How to Assess User Profile & eVA Configuration Information

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We now change gears – and look at how to access and assess User configurations.

Security: User Management Steps



- **Create User**
 - Enter Name, Email, Phone Number, temporary password
 - Associate User with Entity
 - Portal Assigns a user id (first initial + six letters last name + Number)
 - **Assign Applications to User**
 - Ariba = eMall = Shop Now
 - Reports & Documents
 - Quick Quote, Data Management
 - Support (defaulted for all users)
 - **Provide Application Specific User Information**
 - Common information is shared across all applications
 - Workflow Roles & Approvals
 - Permissions or Data Access rights are assigned
 - **Maintain A User Account**
 - Password Reset
 - Add/modify applications, roles, data sources
 - Status
- These tasks are done by eVA security.
 - eVA Entity Security Officers with delegated User Management also perform these tasks.

Your job! –Coordinate & Communicate with eVA Security & Your AE
Make sure user information is correct
eVA & Entity policies & procedures are followed
Appropriate controls are enforced
User Administration tasks are communicated timely
Especially removing users from eVA or changing roles when job duties change

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What is expected of all Security Officers is list in the black box on the slide.

Key Items include – Make sure supervisors assigned in profiles still exist in your organization.

User terminations are accomplished within one business day. This is the one request we will take directly from security officers, AEs, & purchasing directors.

If you make a request to create or change user information, then make sure to follow-up and review the changes once you are notified they have been made. All security officers have access to reports that will allow you to verify the information.

Security: Accessing Security Reports



- Step 1: Login to eVA (eva.state.va.us)
- Step 2: Go to Portal Application: Reports & Documents
- Step 3: Find and click on the Agency Security Tab
- Step 4: Click on Report Number
- Step 5: Print or Download report
 - Use your browser print function –or–
 - Click on CSV or Excel 97 link follow prompts for download
- Step 6: Return to run more reports by closing the report window

Excel 97 Output

Agency Security User Setup Information

Name	Demetri Johnson
ID	Demetri
Agency	A1000001
Email	demetri@eva.state.va.us
Phone	804.696.7400
Buyer Org	A100-SEN
Applications	Analysis Reporting, Audit, Portal, Support
Role	A100 Purchasing Officer, eVA Signer, A100 PO Print
Dispositions	A100
Groups	A100, Purchasing_Report, Service_User_Group, State_Agencies, Technical
DATA	
Expense Limit	0.00
Limit Approver	A100-Support Services Administrator
Default Group	Employee
Supervisor	person2
Catalog	eva_email
Ship To	A10001
Delivery To	Johnson Demetri
Account Status	Active

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This slide provides step by step directions on how to access User Management reports.

The report that is displayed will be discussed in later slides, it demonstrates several items common to all reports. All eVA reports are HTML pages that provide one long page of all the information you requested. HTML pages may be saved using the save as function under the File menu on your browser. These pages may then be opened using excel. We also provide a link on the report which will convert the page to an excel file and prompt you to select a download directory. Many reports also provide a CSV (common separated values) file option.

Security: Key Reports & Their Purpose



- Bulk User Load
 - Used to update multiple users
 - Report to submit as part of annual audit
 - Shows all application access
 - Allows users to have status changed or delete
- Agency User Setup Report
 - User "Card Index" Format for Bulk User Load
 - Use for verifying requests made to eVA Security
- User Profile (eMail)
 - Used to review appropriate workflow
 - Used to review access permissions roles that begin with "eVA"
- Buysense Org Setup (BSO) Report
 - Used to review group profile workflow in the eMail
 - Workflow built for all requisition created by users assigned to the BSO
 - Identifies default billing address
 - Identifies delegated procurement authority official

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These are the key reports that you will use.

eVA has a data management facility that allows for massive loading of Entity configuration data (addresses, account codes, etc) Of particular interest is the bulk data load facility for User Management. The **Bulk User Load** report is formatted for the bulk load facility. You may run the report to get a current view of all User information. Each user is listed as a row on the report. You may make changes directly on the CSV file (we suggest you use excel) –Save it as a CSV file and then send it to you Account Exec. They will review the file and work with you to get a completed file. Instructions on how to use the bulk data load report are posted on the security page.

The User Setup report looks like a card index file of user information. It is much easier to use this report to verify user accounts.

The third report only lists information related to eMail (Ariba Accounts)

Buysense Org is a group profile. Group profiles provide most of the workflow in eVA. Your Entity decided with the assistance of the DPS AE how many group profiles and what workflow was required. These decisions may be refined as your Entity begins to use more eVA functions.

Right now you are concerned with group profiles simply to determine if someone other than the requester is approving a requisition and under what circumstances.

Security: User Profile Data



Name	Bennett, John
ID	jbennett
Agency	A100SEN
eMail	jbennett@state.va.us
Phone	804-690-7460
BuySense Org	A100-SEN
Applications	Analytical Reporting, Ariba, Portal, Support
Roles	A100-Purchasing Officer, eVA-Rpt-Hist, A100-PO Print
Data sources	A100
Groups	A100, Purchasing_Report, Secure_Users_Group, State_Agencies, Technical
DPA	
Expense Limit	0.00
Limit Approver	A100-Support Services Administrator
Default Group	Everyone
Supervisor	moore2
Catalog	ery_email
Ship To	A10001
Deliver To	John Bennett
Account Status	Active

Agency: Assigned at setup contains A for Agency, L for Local Government + DPB budget number

BuySense Org: Workflow Profile

Applications assigned to User

eMail Roles & Eprocurement Roles

Data source: Access only agency data

Groups: Reporting Groups or Page Tabs

DPA – Blank means No Limit

Expense Limit – 0.00 all requisitions must be approved

Limit Approver – Role or Person that approve requisitions

Everyone is defaulted for everyone

eVA supervisor ID

Catalog Controller – What Catalogs user can access

Default Shipping location ID, User may change on req.

Default Deliver to text, User may change on req.

Active = Access eVA, Lockout = password needs reset

Deactivate = User left organization – logical delete

Hint: All user reports have similar data, but in different formats.

Address reports link Address ID to address, Roles Reports list all users assigned to a role, eVA_Email accesses all non-agency specific catalogs

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Applications: All users are assigned Portal (this allows them to access the portal page) and Support (which allows them to send an email to customer support)

The Portal Menu Option Reports & Documents = Analytical Reporting,

The Portal Menu Option Shop Now = Ariba

Roles: Agency created roles begin with the Agency Number preceded by an A. eVA Roles are roles that require eVA security approval. These roles provide access to data above what all users have. We normally default eVA-RPT-Heir which allows a user to run eMail operational reports about their requisitions.

Supervisor: Again – Prime field to check – First does the use still exist in the organization. Second a decision – Does your organization want to change the use of this field. Possibly the security officer or the purchasing director should be located their. We will be modifying this report to include the Supervisors name.

Ship to: Right now It is just the unique id – Check that is begins with your Entity code – if not you are shipping outside of your organization. An \$ symbol indicates it is an exception address. We will be modifying this report to include the shipping address. This is the default shipping location for the user. Users may change the shipping location at the time the requisition is created.

The Deliver To: Is a free-form text field that can be used to further describe the shipping address. Earlier in the presentation I suggest that the shipping address for a university may include the Building – and the Deliver to could then include the Receiver's Name, Floor, and Room Number

Security: Group Profile (Buysense Org)



Department Name:	A194DGS	?	Agency: A for Agency, L for Local Government + DPB budget number
Department Description:	Department of General Services	?	Buysense Org: Reference ID for BSO
Buysense Org:	A194-DCLS BT Grant	?	Billing Address Default
Billing Address:	DGS - DEPARTMENT OF GENERAL SERVICES	?	Workflow Approver for All BSO requisitions
Dollar Approver 1:	A194-Buyer Inbox DPS DO DCLS - \$5,000.01	?	Workflow Approver Second Approver
Dollar Approver 2:	A194-DCLS Bureau Director - \$5,001.00	?	Workflow Approver – Third Approver
Dollar Approver 3:	A194-DCLS-DIRECTOR - \$25,000.00	?	Desktop receiving if blank
Central Receiving:	A194-DCLS BT Grant Recv	?	Commodity Requisition & receiving approvers
Commodity Approver 1:	A194-Commodity Receiver	?	Approver when user over DPA amount
Commodity Approver 2:	A194-Commodity Receiver	?	Person or Role that Prints a PO when not sent electronic
DPA Approver:	A194-DGS Green Buyer Inbox		
PO Printing:	A194-DGS Green Printing		

Commodity Code 1-20	Commodity Code Approver 1-20	Watch Commodity Code 1-10	Commodity Watcher 1-10
1:4316	1:A194-SOFTWARE-4316 2:A194-HARDWARE-4317	1:431715	1:A194-TELEPHONY-431715
2:4317	3:A194-COMPSERV-8111 4:A194-TELECOMMEDIA-	2:431716	2:A194-ANTENNAS-431716
3:8111	8311 5:_____ 6:_____	3:_____	3:_____
4:8311	7:_____ 8:_____	4:_____	4:_____
5:_____	9:_____ 10:_____	5:_____	5:_____
6:_____	11:_____ 12:_____	6:_____	6:_____

Hint:

Other Buysense Org reports display which users are assigned to the Buysense Org

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The Buysense Org or Group Profile contains many different workflow events. As you can see DGS uses most of the workflow options available on eVa.

The **Buysense Org** Field relates ties back the the User Profile Buysense Org Field. There is also a report that associates all users with their Buysense Org.

Billing Address: This is the default address – Billing addresses may be changed at the time of requisition creation.

The next fields are three requisition approver fields based on dollar amount of the requisition. They may all have the same dollar amount or different amounts. They are intended to be sequential, but can be configured to be parallel approvals.

Central Receiving: If the field is filled in – then the Buysense Org is using Central Receiving (a common location for all orders) If blank – receiving is being done by the individual that is in the on behalf of field (usually the creator of the requisition). If the role used has the word repository in it – It means the part of your organization has chosen not to use the receiving function.

The next two boxes determine if the organization is doing any approvals based on commodity codes. There are two roles – they are triggered based on the UNSPSC codes placed in the Commodity Code fields below.

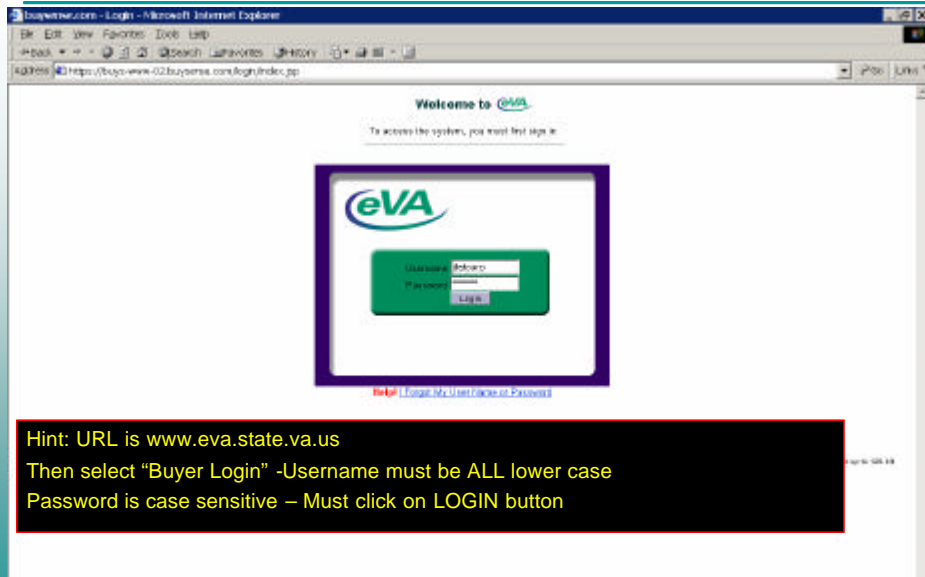
DPA– The role that is used to route requisitions when the user has exceeded the DPA amount on their user profile. This role should not be blank. If it is blank and a user exceeds their DPA amount or attempts to change it – a system error will occur – if on a requisition the Requisition will be hung and cannot be moved into ordering status. If on a profile – the profile will be hung and must be cancelled before a profile change can be made.

PO Printing: Person or Role that is responsible for printing POs when the vendor does not accept electronic POs – if blank the user is responsible for printing their POs.

- eMail Profiles
 - Valid Supervisor
 - Has a Buysense Org - it appears correct – Begins with your agency code
 - Has a catalog controller
 - eVA Roles – No restricted combinations
 - May have either eva-edit-approval or eva-querryall permission but NOT both
 - Only one Entity user should have eva-nosupervisor
 - Users authorized to centrally receive goods/services should not have final purchase authority – Check for roles with RCV in them
 - Demographic Information – especially eMail address & default shipping is correct
- Buysense Profile
 - Has at least one approver
 - Has a valid billing address
 - Appropriate Receiving Choice
 - Central or Desktop Receiving
 - Agency not doing receiving will have a role ending in receipt-repository

- Reports & Documents
 - Access only Entity data sources
 - If administrator access to DMReports data source
 - Reporting groups appear appropriate
 - Public, Buyer, Technical, Security,
- Data Administration (maintaining Entity configuration data)
 - Address Updates done per Entity Policy
 - Field Data (accounting data) done per Entity Policy
 - No Permission to add Roles
- Question About Access?
 - Ask Entity Purchasing Director or eVA Team Lead
 - Account Executive at DPS
 - eVA Security

Security: Step 1- Log Into eVA



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Security: Step 2 - Portal Screen



Left Menu – This list varies based on applications assigned to the User

Most Users have: Shop Now, Reports & Documents, Portal & Support
System Administrators have Data Management
Security Officers With delegated user management have User Management

Security Reports are located under the Portal Application: Reports & Documents

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Security: Step 3 - Select Agency Security Tab



Find Agency Security
Depending on the number of groups assigned to your ID, the order may vary.

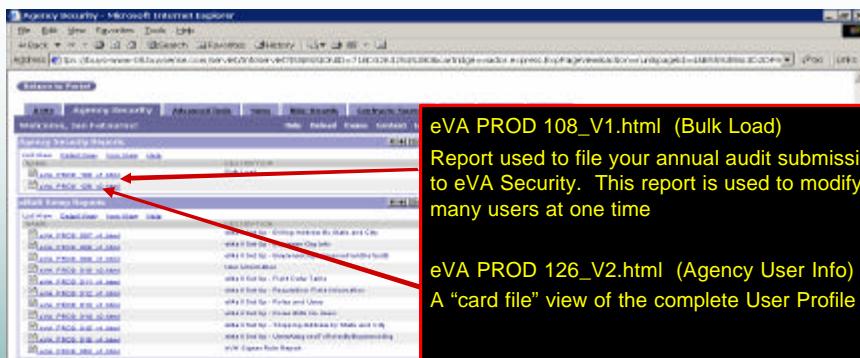
HINT:
Scroll to the Right to find more tabs!
To gain access to the Agency Security tab you must be assigned to the Reporting Group: Agency_Security group and Data Source: DMReports

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Security: Step 4: Select & Run Report



eVA PROD 108_V1.html (Bulk Load)

Report used to file your annual audit submission to eVA Security. This report is used to modify many users at one time

eVA PROD 126_V2.html (Agency User Info)

A "card file" view of the complete User Profile

HINT:

Reports will allow you to choose data source (A + Entity Number)

To see all information for your Entity – select the Entity and leave other choices on default setting

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Security: Reports & Documents



Agency Security - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: http://eVA-prod-008.v1.html

Agency Security Reports

Name	Created Date	Status
eVA PROD_008_V1.html	01/15/2003	OK
eVA PROD_010_V3.html	01/15/2003	OK

eVA PROD_008_V1.html (eMail Buysense Org (Group Profile) Info)
eVA PROD_010_V3.html (Email Profile)
Provides eMail Profile Information organized by Agency Group Profile (Buysense Org) Helpful to Purchasing offices in verifying workflow

A Buysense Org (Group Profile) defines requisition and receiving workflow for a group of users in your Entity. Buysense Orgs also define default requisition data and the default billing address for the group.

Hint: For more information on Group Profiles and workflow options read the eVA Agency Implementation Guide

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Self Study Questions



- Using the Agency User Information report – Identify a user with ShopNow and Reports & Documents. What application names are used?
- Under what field did you find data access rights for reporting?
- Find a user with edit approval permissions in the email. In what field was the permission located? What is the name used for the permission?
- Name a combination of permissions not allowed by policy.
- What could happen if they are given to a user?
- Why is the bulk data load report required with your annual audit submission?

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Application names are: Reports & Documents = Analytical Reporting, ShopNOW = Ariba

Datasources on the User Management Report

Roles – eVA-editapproval

eVA-queryAll and eVA-editapproval

A user could change a requisition that belongs to a different organization.

It allows mass updates of user changes.

Submitting User Profile Changes & Reviewing eMail Profile Requests

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- Establishing a New User (Section 4.3 pp 20 -24)
 - Complete an individual user form or a bulk data load user template
 - Security Officer emails or signs and sends the form to the Entity's DPS Account Exec
 - AE reviews the form(s) and sends them to eVASecurity for processing
 - eVA Security notifies AE & eVA Entity Security Officer when processing is completed
 - eVA Entity Security Officer can run reports to verify information entered was complete and accurate
- Modifying a User Account – By the User
 - The user may modify his eMall Profile
 - It will become active if all approvers approve the modification
 - eVA Entity Security Officer should carefully review all role changes prior to approving the request

eVA security officers will need to work with their procurement office to complete user request forms. The forms are posted on the agency security tab under reports and documents.

The last part of this presentation will show you how to access user profile requests and approve them

Security: New User Information – Portal & Reports



- Mandatory Fields for New User Portal (pp 20)

First & Last Name	User's Name
Agency/Entity Identifier	Agency DPB number or Client Name for Public Bodies
eMail Address	eVA users are required to have an email address

- Required Fields for Reports & Documents (Analytical Reporting)

Data Controller	The databases that the user may access. Default if Agency Ordering data If Security reports are required must request DMreports
Reporting Group	The group or groups that in combination display the report tabs on the portal. Default is Secure_User; Must Request Security, Advanced_Tools , or Technical

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These charts will assist you in completing the user security access request form

The text identifies what eVA security will use for defaults.

Security: New User Information -eMall



- Mandatory Fields for New User eMall (pp 21 -22)

Buysense Org Name	The group profile for the user
Supervisor:	The supervisor entered in the profile must be an eVA user.
Default Ship to	The primary shipping location for the user

- Optional Fields for New User eMall (pp 21 -22)

Catalog Controller:	If not specified eVA_Mall will be assigned
Delegated Purchasing Authority (DPA)	The maximum amount (exclusive) at which the user may make a procurement resulting in a purchase delivery order
Expenditure Limit:	The maximum amount (exclusive) the user may expend without the Expenditure Limit Exceeded Approver approving the requisition
Expenditure Limit Exceeded Approver	The role or person that will approve expenditure exceeded requisitions
Roles	Add as many roles are required

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- Password Changes & Resets using eVA Security (4.3.3 p24)
 - Users **email** password change requests directly to eVA Security
 - eVA Security will only reset password that have a status of “locked-out”
 - eVA Security will only accept a password reset from the email account associated with the user on eVA
 - OR
 - The eVA Entity Security Officer
- Password Changes & Resets – Delegated
 - Users email password change requests directly to the eVA Entity Security Officer
 - Entity Security Officer is responsible for establishing reset criteria for their Entity

- Deactivating User Accounts (4.3.4 p 25)
 - Requests in writing (including email)
 - From eVA Account Exec, COVA Entity Security Officer, COVA Entity Purchasing Director, or COVA Entity CEO
 - To evaSecurity@dgs.state.va.us
 - Include User full name, user name, organizations, email address and a Contact number
 - Supervisors Require Special Handling
 - Need a list of everyone they supervised
 - We have a report for this!
 - Need to state a replacement supervisor that has an eVA account!
 - User Accounts have their status changed to “Deactivated” and a (D) is place behind their last name
 - Notice of Deactivation is sent the the DPS Account Exec and the COVA Entities Security Officer

Security: Permanently Deleting a User Account



- Physical deletion of a user account removes all references to the user
 - Email Searches by User Name for Approvals, purchases, receiving cannot be conducted
 - Data Warehouse references to purchases remain
 - Physical deletion requests must be reviewed and approved by the DPS account exec
 - Accounts should not be deleted prior to all transactions the user participated in are finalized
 - Once a user id is deleted it is never reissued!

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When you physically delete a user the user's name is removed from all applications including Ariba. This makes looking up requisitions the user created or approved difficult. You will not be able to use their name, because their names will be removed from the employee list. There are other ways of looking up the information like the order number, date, supplier, etc. But it does make it more difficult. We strongly suggest that you do not physically delete a user until your annual audit is completed.

Change Orders: At this time only the user that created the original request may issue a change order. If you physically delete a user – there will be no way to create a change order against any orders the deleted user may have created.

Approval Processes are similar throughout eVA, regardless of the type of request that you're approving

Remember, before you edit, approve, or deny a request be sure to review the details

The next slides review how to approve in eVA eMail

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The slide says it all...

REMINDER: It is important to review request details prior to approving them:

There are many types of requests. You may approve requisitions, receipts, or user profiles.

We will only demonstrate user profile approvals

User profile change approval is required if changes made by a user affect . . .

- Management chain information (used in approval rules)
- Demographic information
- Roles or Data Access Requests

There are three approver types in eVA.



Approver (Individual) - an individual responsible for approving the expenditure -- such as, a supervisor or manager.



Approver (Role) - a group of users who share the same approval responsibility -- not a specific person.



Watcher – an individual (or group) without approval authority who needs to be notified of certain requests

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Approver types

- ☒ Watcher - a watcher's status is Optional – This is issued when some buys on your behalf.
- ☒ Approver (Individual) - provide an example of someone other than a supervisor or manager who might approve items
- ☒ Approver (Role) - an example may be the IT staff who are responsible for approving all computer purchases or managers who must approve all purchases over a certain dollar amount

Key changes that can be made include . . .

What are the impacts?

Permissions	Permissions allow a wide array of system access privileges.
Roles	Roles vary and some persons may be designated as approvers elsewhere in eVA.
Group Profiles	Group Profiles determine the user's approval flow requirements and default accounting codes.
Catalog Controller	Catalog Controller assignments determine the mix of catalog items that a user can access.
E-mail Address	Used for e-mail routing with eVA - check for accuracy.
Phone Number	Phone numbers are printed on purchase orders

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Security- 57

Before approving a User Profile modification, be sure to check what changes the user has submitted. Key changes that can have major impacts are:

- ☒ Permissions - evaluate any permission changes submitted through a user profile modification as permissions determine a wide array of system access privileges
- ☒ Roles - role members may be designated as approvers elsewhere in eVA, so role changes should also be carefully evaluated
- ☒ Group Profiles - this determines the user's approval flow requirements and default accounting codes; the System Administrator should be made aware of any changes to a Group Profiles assignment
- ☒ Catalog Controller - this determines the mix of catalog items a user can access (the System Administrator should be made aware of any changes to a Catalog Controller assignment)
- ☒ E-mail Address - is used for all e-mail routing within eVA, so it should be checked for accuracy
- ☒ Phone - this phone number will be displayed to other users within eVA

TRANSITION - Next, we're going to look at approving the User Profile Request...

Security: eVA Portal User Preference



To approve eMail workflow or delegation amounts you must access the eMail swoosh screen.

It is important to remember that on-line User Profile preferences take effect once fully approved. This is a good option when users need to make a request to change their profile and the request needs to take effect on the day it is approved.

If you are attempting to change many profiles (ie reconfigure eVA for your organization) then User Management options like Bulk Data Load discussed in previous slides should be used. Contact your DPS AE for more information on your options.

Security: Swoosh Screen Method



To access requests needing your approval - you may choose use the Swoosh screen

As an Approver - you may be notified by email when it's your turn to approve
Click the URL link and log into eVA – you will go directly to the approval screen

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The first method we'll talk about is the Swoosh screen method.

If your approval is required on any request, the **Approve** button on the Swoosh screen will flash, indicating that there are requests in your inbox. If you are listed as an approver either by name or you are assigned to a role you will also receive an e-mail notification that there is a requisition awaiting your approval. All users enrolled in a role will receive an email.

DISCUSS the escalation feature contained within eVA.

- ✉ eVA provides a feature that will automatically escalate a request that has not been acted on within a set number of days.

If an Approver does not act on a request in two days, an e-mail reminder will be sent to the approver. Following an additional 24 hours, the request automatically sent to that Approver's Supervisor for action.

NOTE: This escalation feature only works if the approver is in an approval by name.

Security: Approvals Swoosh Screen Method



Welcome eVA Supervisor3. last visit 3/11/2001 10:15 AM eV4

Home Logout Preferences Toggle Tips Toggle Currency Help

Approve
Needs Approval 2
Status
Composing 0
Submitted 0
Approved 1
Denied 0
Create
Regulation
Explore
Saved Searches
System Searches
Catalogs
Folders
Report
Saved Reports
Standard Reports
Reconcile
Change

Approve Receive
Status Explore
Create

Welcome to eVA

To access approval list, click flashing **Approve** button

[Return to Portal](#)

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The slide says it all.

TRANSITION...

Security: Approvals Short Cut Method



Welcome eVA Supervisor3, last visit 3/11/2001 10:15 AM eV4

Home Logout Preferences Toggle Tips Toggle Currency Help

Approve
Needs Approval 2
Status
Composing 0
Submitted 0
Approved 1
Denied 0
Create
Regulation
Explore
Saved Searches
System Searches
Catalogs
Folders
Report
Saved Reports
Standard Reports
Reconcile
Change

Create Status Approve Receive Explore

Welcome to eVA

Return to Portal

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Support

or click the **Needs Approval** short-cut in the Process Steps on the left

The slide says it all.

TRANSITION - Click Needs Approval to view the Approve Requests screen...

Security : Approve Requests Screen



After selecting a request and reviewing the items selected on other screens, you can click **Approve** or **Deny**

Type	ID	Date Submitted	Requester	Status	Title
Submitted	UP1234	Tue, 5:05 PM	Test1, Virginia	Submitted	User Profile Changes for Test1, Virginia
Submitted	UP1235	Thu, 8 Jun, 2000	Test1, Virginia	Submitted	User Profile Changes for Test1, Virginia
Submitted	UP1236	Fri, 22 May, 2000	Test1, Virginia	Submitted	User Profile Changes for Test1, Virginia
Submitted	UP1237	Wed, 21 May, 2000	Test1, Virginia	Submitted	User Profile Changes for Test1, Virginia
Submitted	UP1238	Wed, 21 May, 2000	Test1, Virginia	Submitted	User Profile Changes for Test1, Virginia
Submitted	UP1239	Wed, 21 May, 2000	Test1, Virginia	Submitted	User Profile Changes for Test1, Virginia

To view request details or edit a request Click on an **ID** or **Title**

This screen displays **all requests** requiring **your approval**.

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OVERVIEW of the Approve Requests screen.

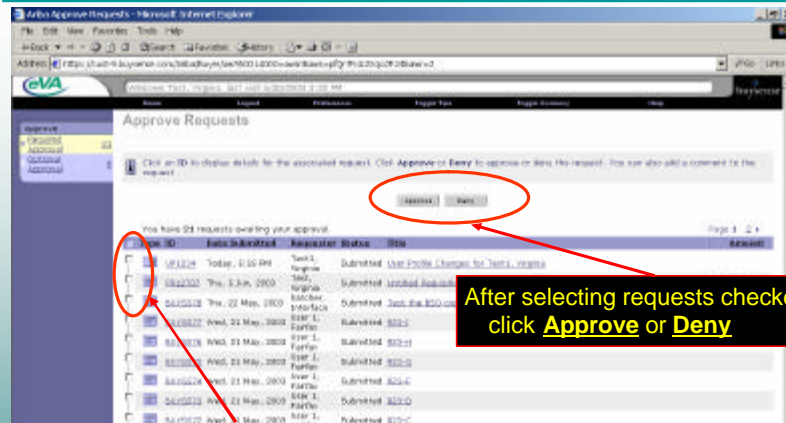
If you decide to view the details or edit the request prior to approving it, you can click on title of the request to access all available details.

Notice the Title for a User Profile Request contains the name of the User requesting the change. In this example Test1, Virginia

To change a User Profile request you must have the eVA-editapproval permission. Not all approvers have edit authority. These approval role decisions are made when eVA is set up by the agency.

User requests will be listed on the same page as all other approval requests you may have (ie requisitions, receiving). User Profile requests begin with UP.

Approvals: Approve Requests Screen



After selecting requests checked, click **Approve** or **Deny**

To act on several requests simultaneously, click on the check boxes to select the requests.

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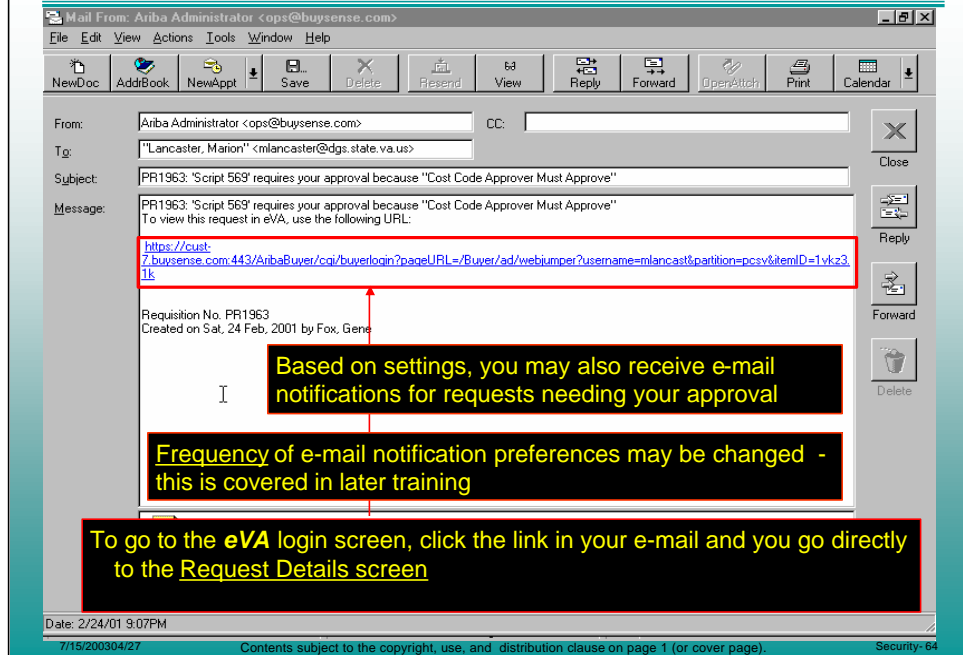
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You can take the same action on more than one request (approving, for example) by selecting the checkboxes to the left of the **Type** field.

TRANSITION - Next, we'll look at the second method for accessing your approvables, e-mail notification...

Approvals: E-mail Notification Method



If your e-mail notification preference is set to Summary Notification, you will receive notification of requests awaiting your approval at a set interval (e.g., one per day) and will use the Approve Requests screen to access individual requests (which we just discussed).

TRANSITION - Now let's take a look at the details of a User Profile request..



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Although for most changes this screen is helpful – for roles it provides you a list in the to column of all roles the user still has. To find out what changed you need to match roles in the from column to roles in the to column. Roles may be either added or deleted. Again – roles should begin with your agency identifier or eVA.

Approvals: Approval Flow Graph



Click the **Approval Flow** tab to see where the request is in the Approval Process

The current Approver is displayed in **bold text**
Once action is taken - the **color of the box changes to green** and the icon is a check (if approve) or **red** and the icon is an "X"(if denied)

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OVERVIEW of **Approval Flow** tab

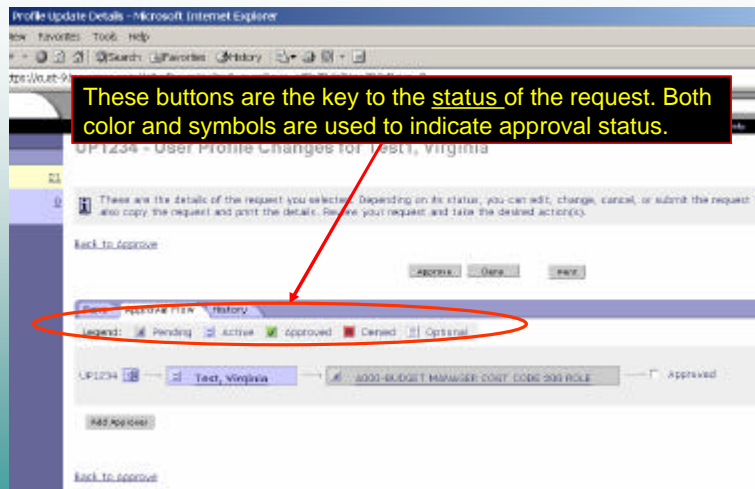
The **Approval Flow** tab shows a diagram of the approval flow for the request.

- ☒ It lists all approvers and watchers that have taken or will take action on this request
- ☒ This is the same Approval Flow that is viewed by users when submitting a request, such as a requisition (that students may have seen in other training)

POINT OUT that the five statuses are displayed in the Legend. Let them know that this is what we will talk about next.

TRANSITION - Next, we're going to discuss each of the five statuses shown on this screen...

Approvals: Approval Status



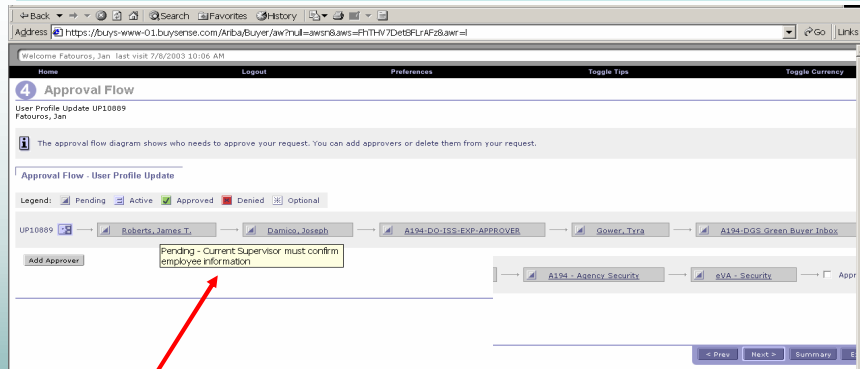
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The slide says it all.

Security: eMail User Profile Approval Flow Graph



All Profile changes must be approved by the supervisor
Supervisor changes must be approved by Old and New supervisor
Expenditure Supervisor changes must be approved by Old and New Exp Supervisor
Role changes must be approved by eVA Entity Security Officer & eVA Security

Hint: Mouse over the box – and the reason for approval appears!

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This slide displays the workflow for a User Profile where all fields were changed.

Event: Request a change of supervisor: The first approver is the current supervisor. Next is the Requested New Supervisor

Event: Request a change to expenditure approver: The current expenditure approver and the new expenditure approver (notice we are moving from a role to an individual)

Event Change the DPA amount: The DPA approver must approve

Event: Deleted a role – The Agency Security and Eva Security officer must approve.

If you move the mouse over the approval box – the reason the individual must approve will be displayed.

The small ICON next to the approval name or role indicates the approval status. In this example all approvals are pending.

Approvals: Viewing History



Since you are responsible for all requests that you approve, you need to be familiar with the **History** tab.

When you click the **History** tab, you see the history of the request.

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Once the **History** tab displays, you can view each transaction for this request.

The **History** tab is a good way to get acquainted with a request in documents all events against the request including any editing of the request after submission. If changes have been made the text that was changed will be recorded

Remember approving a request is just like signing a document.

- ☒ You are responsible for all requests that you approve
- ☒ It is your responsibility to make sure the request is correct (based on the information you've been provided)
- ☒ Let students know that their organizations have placed a lot of trust in them

If you have many requests to review you may change the way you view this information.

- ☒ Actions are normally displayed by date with the most recent action at the bottom of the list
- ☒ You can re-sort the information by clicking on the column titles.
- ☒ If you click the column Label –Date – you will change the sort order from ascending to descending.

TRANSITION – Now that we have reviewed the request we are ready to approve or deny the request

Approvals: Viewing Details



UP1234 - User Profile Changes for Test1, Virginia

These are the details of the request you selected. Depending on its status, you can edit, change, cancel, or submit the request to get a copy of the request and print the details. Review your request and take the desired action(s).

Back to Approvals

Approve Deny Print

Form Approval Flow History

Title - User Profile Update

Title: User Profile Changes for Test1, Virginia

User Profile Details

Change	From	To
Expenditure Limit:	\$0.000/50	\$0.000/000/50
Expenditure Limit (Current Approval):	(no value)	0000 BUDGET MANAGER COST CODE 200 ROLE

Comments - Entire User Profile Update

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Possible actions at the top of this screen include:

- ☒ Approve - when you click **Approve**, the request either moves on to the next approver (if there is one) or become effective – if fully approved
- ☒ It is a best practice to document the reason you approve the request. This is very important if you are approving an eVA role. eVA security will request justification for adding an eVA role.
- ☒ Deny - when you click **Deny**, the request is returned to the user who sent it. Adding a comment to a denied request will explain your actions (but isn't mandatory). For example, an approver may deny a request which exceeds the budget for an account line, or has incorrect account codes.
- ☒ Print - used to print the request

POINT OUT that you can add comments to a request for any action that you take (Approve, Deny, or Edit) by clicking **Add Comments** at the bottom left of the screen (the process as adding comments or attachments to any request).

Security: Approving User Profile Requests



Welcome eVA Supervisor last visit 1/23/2001 10:52 AM

Home Logout Preferences Toggle Time Toggle Currency Help

UP287 - New User Profile for eVA Requestor Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, cancel, or submit the request for approval. You can also copy the request and print the details. Review your request and take the desired action(s).

Approve Deny Print

Form Approval Flow History

Title - User Profile

Title: New User Profile for eVA Requestor

User Profile Details

Change

Expenditure Limit: \$0.00

Comments - Enter

Add Comment

If eVA Entity Security needs to approve the request
eVA Security will be the last approver of the request

The screen says it all.

TRANSITION...

Security: Self Study Questions



All Security Request must be sent from the email account of or signed by the _____?

Two ways to access on-line User Profile requests is to _____ or _____?

Before approving a request you should review the _____?

List which approver workflow boxes will be created when a user changes:

Their Supervisor

Their DPA Limit

Their Expenditure Limit

A role

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All Security Request must be sent from the email account of or signed by the _____?

eVA Entity Security officer

Two ways to access on-line User Profile requests is to _____ or _____?

From the approval button on the eMail swoosh screen or by clicking on the URL in the email notification

Before approving a request you should review the _____?

Details screen

List which approver workflow boxes will be created when a user changes:

Their Supervisor – The Current Supervisor and the Newly requested supervisor

Their DPA Limit – The Role or user in the Buysense Org (group profile) DPA approver Field

Their Expenditure Limit – The current expenditure limit approver

A role – the eVA Entity Security Officer and the eVA Security Officer

Supplemental Information

How Users Change eMail Preferences

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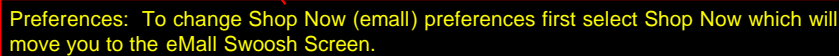
Security- 73

This section is to assist you in changing your user profile or helping others in their organization to change their user profile.

The slides presented here are extracted from the “Learn about Approvals” training manual posted on the Training page of eVA.

Reminder: User profile changes made on-line in the email become effective once fully approved. Use the approver tab to determine who must approve the request. These changes are also written to BS Admin in near real-time (because we use a messaging protocol – some messages may be queued for up to 15 minutes).

Reminder: To access the eVA portal screen – begin by typing in www.eva.state.va.us into a web browser. On the top black menu bar on the eVA opening screen – Select Buyer’s Login – Enter Your User Name and Password – You will then be at the screen presented in the next slide.



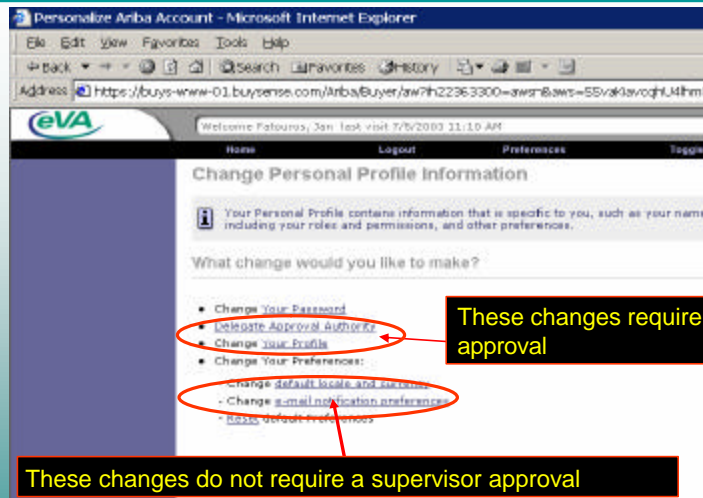
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74



75

Approvals: Changing Personal Information



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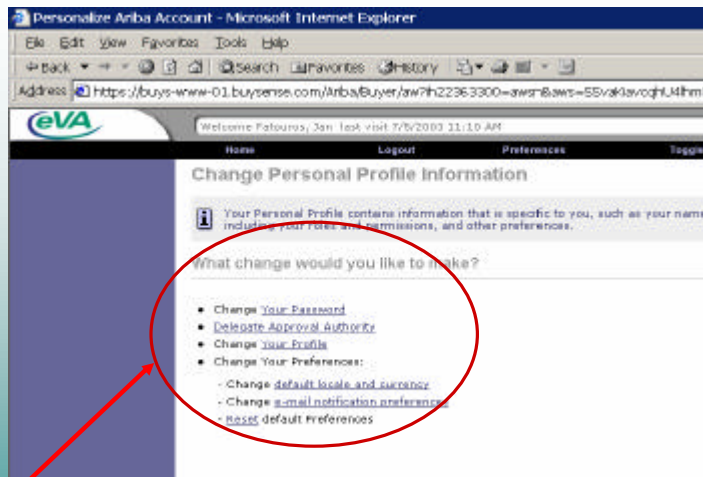
This is the preference option you see – when you select Preferences from the eMail (shop now) Swoosh Screen.

At a minimum the supervisor must approve changes to

- ☒ Delegate Approval Authority
- ☒ Your Profile

No approvals are required to change e-mail notifications, default currency or password changes

TRANSITION - Let's look first at the Delegate Approval Authority processes...



Email Preference Options: *Change Your Password*, *Change Your Preferences* options do not require an approval

Delegate Approval Authority & *Change Your Profile* ALWAYS require the user's supervisor's approval and many times additional approvals

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Your Password: Same as at the portal. This link takes the user to the change password screens.

Delegate Approval: This link allows the user to designate an individual that can approve requisitions for them. This is convenient when staff go on vacation, but users need to understand that delegation is just like handing someone their signature. For example: Jan delegates approval authority to Sue. When Sue logs-in to eVa Shop Now she will be asked – do you want to be Jan or Sue. If she selects Jan she can only see requisitions or receiving documents that Jan must approve. When Sue approves a requisition “as Jan” the approval box and history appears as if Jan approved it. It is Jan’s login id that is used. From the user’s perspective – you have no indication that the requisition was approved by someone other than Jan. This is very important – if you are investigating fraud or other misuse issues. Although not displayed, the actual user id is stored in the bowels of the application. If you must know contact eVA security and we will request a data extract from AMS. Delegation requests must be approved by the user assigned in the supervisor position.

Sue cannot create a requisition as Jan or perform other functions that only Jan can do.

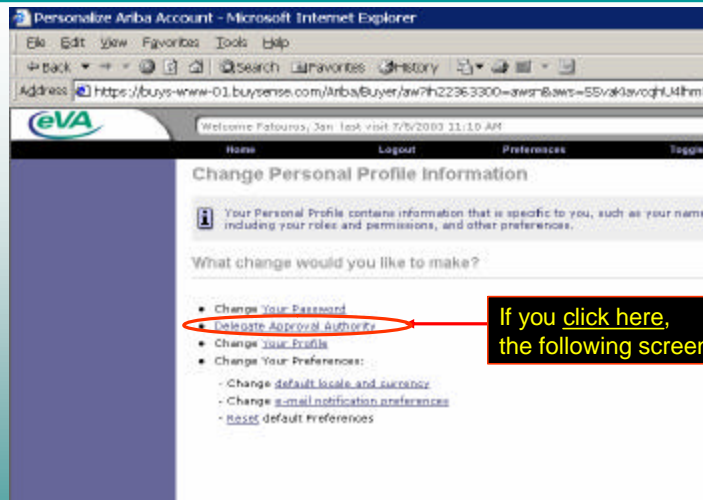
Your Profile: This is the section that allows users to request changes to their workflow, roles, and purchasing limits. All profile change requests must be approved by the supervisor. In many cases the request must be approved by others. eVA security officers are inserted in the approval flow when roles are changed. Profile requests do not become effective until fully approved.

Default Locale & Currency: Allows the user to change how pricing information is displayed – Should not be changed

e-mail notification: Allows users to define the frequency (never to on every event) they will be notified about document workflow activity

Users with purchase cards that are not using the expenditure limit approver to ensure approval notification should not turn off email notification for watcher approvals.

Approvals: Changing Personal Information



If you **click here**,
the following screen appears . . .

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Reminder: It is important to understand that when you delegate your Approval Authority – You are delegating your electronic signature. All requests approved by the delegatee will have Your NAME and User ID associated to it. From the on-line screening it is impossible to determine what ID actually approved the request. Be careful when delegating – you will be accountable for the decisions that are made in your absence.

Approvals: Delegate Authority

Welcome eVA Approver: last visit 1/24/2001 4:48 PM

Home Logout Preferences Toggle Tip Toggle Currency Help

1 Delegate ✓
2 Approval Flow ✓
Summary ✓

1 Delegate Approval Authority Next > Summary > Exit >

User Profile LP015
New User Profile for eVA Approver:

Select the name of the person you want to delegate your approval authority to. Enter the delegation start and end dates, and the reason for delegation.

*Delegate: eVA Supervisor
*Delegation Start Date: Today, 12:00 AM
*Delegation End Date: Fri, 2 Mar, 2001
Delegation Reason: Vacation
Notification: ☒ continue to notify me by e-mail of approval requests

* Indicates required field

You may change information on this form whenever you need to delegate approval responsibility for a period of time

For example - for vacation, lengthy illness, etc.

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REMINDER we access the Delegate Approval Authority screen, when you click **Delegate Approval Authority** on the Change Personal Profile Information screen.

Notice we are on Step 1, Delegate (notice that it is highlighted and checked in the Process Step Area).

Occasionally you may want to assign your authority to another eVA user to take over your approval responsibilities (delegator). Or you may take on another approver's approval authority while they are away (delegatee).

Some reasons why you might delegate your authority. You are going on vacation or during a lengthy illness.

Stop a think of other reasons why you would delegate your authority.

TRANSITION - Next, we'll move on to the second step in delegating your authority, Approval Flow. Click **Next**...

Approvals: Delegate Authority




REMINDER To access the Approval Flow screen you click **Next** on the Delegate Approval Authority screen.

We are on Step 2, Approval Flow (notice that it is highlighted and checked in the Process Step Area).


The Approval Flow shown here is the approval flow for your request to delegate your authority for a period of time.

TRANSITION - You have delegated your authority and viewed the approval flow for this request. Now, you need to review the summary of your changes. To do so, click **Next**...

Approvals: Review Summary of Changes



Welcome eVA Approver last visit 1/24/2001 4:48 PM



[Home](#)
[Logout](#)
[Preferences](#)
[Toggle Tips](#)
[Toggle Currency](#)
[Help](#)

Delegate Authority

- 1 Delegate ✓
- 2 Approval Flow ✓
- 3 Summary ✓**

Review Summary of Changes

[< Prev](#)
[Next >](#)
[Submit](#)
[Exit](#)

i Review your user profile changes. Click **Submit** to submit them for approval.

Change	From	To
Delegate	(no value)	eVA Supervisor
Delegation Start Date		Tue, 23 Jan, 2001
Delegation End Date		Fri, 2 Mar, 2001

[< Prev](#)
[Next >](#)
[Submit](#)
[Exit](#)


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To access the Review Summary of Changes screen, you click **Next** on the Approval Flow screen.

We are on the final step of delegating your authority (notice that Summary is highlighted and checked in the Process Step Area).


TRANSITION - You have delegated your authority and viewed the approval flow for this request. Now, you need to review the summary of your changes. To do so, click **Submit**...

Approvals: Review Summary of Changes





Welcome eVA Approver last visit 1/24/2001 4:48 PM



[Home](#)
[Logout](#)
[Preferences](#)
[Toggle Tips](#)
[Toggle Currency](#)
[Help](#)

Delegate Authority
 1 Delegate ✓
 2 Approval Flow ✓
 Summary ✓

Review Summary of Changes

User Profile UP325
New User Profile for eVA Approver

Review your user profile changes. Click **Submit** to submit them for approval.

Change	From	To
Delegate	(no value)	eVA Supervisor
Delegation Start Date		Tue, 23 Jan, 2001
Delegation End Date		Fri, 2 Mar, 2001

If okay - click **Submit**

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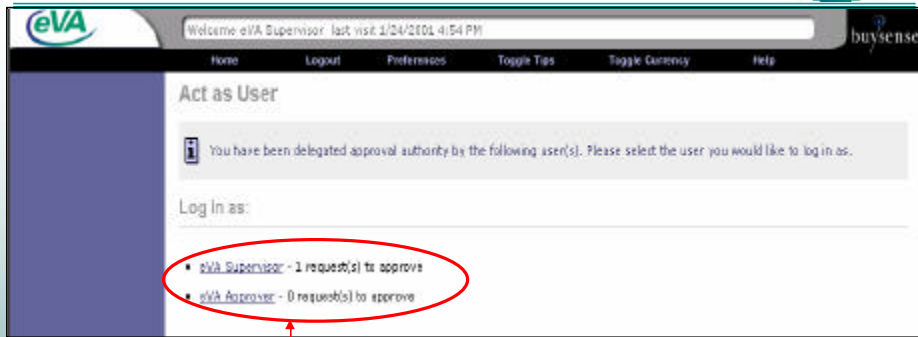
Review the summary and if everything is OK, click submit.

Once submitted, this request will need to be approved by your supervisor. The delegation will not become effective if the supervisor does not approve it.

Also, give the supervisor a day or two to approve. If the Start date on the request is “in the past” when the supervisor gets around to approving it – they will not be able to approve the request.

Another way to keep approvals moving during an absence is to use roles and enroll more than one user in the role.

Approvals: Act as User



If you are delegated the authority to approve for another user, you will see this screen each time you log in

It displays all users whose requests you can approve
You may select yourself or any other user listed
If you do log in as another user, be sure log out and back in as yourself before creating new requests or taking action.

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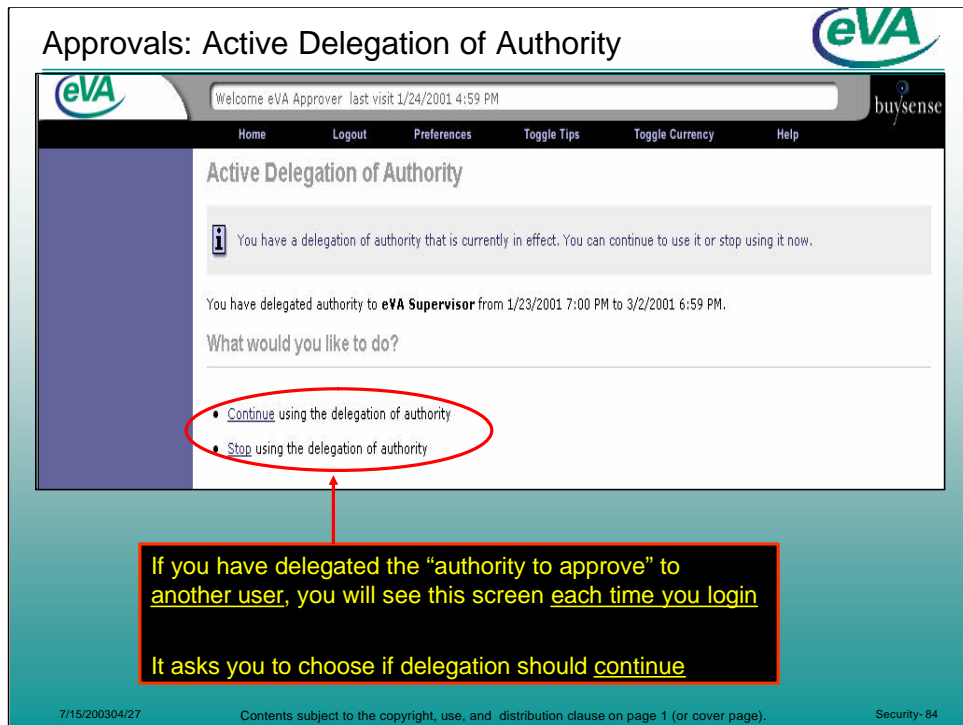
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Once the delegation period starts, the Delegatee will be prompted at login to select the user they wish to act as during their session.

If you have approval authority for another user, you can log in as yourself or as the other user.

If you log in as another user, remember to log out and back in as yourself before taking actions that are associated with your own user profile.

Reminder: When approving requests as the delegatee – the Name of the delegator will appear in the Approval. When you delegate you are giving someone your electronic signature!



If you have delegated your signing authority – you will be reminded everytime you access Shop Now (email) with the Active Delegation of Authority screen.

If the delegator logs into eVA while delegation is active, they will receive a message informing them that the delegation is active.

Likewise, the Delegatee will receive a message when they login, informing them of the active delegation (he or she will see the Act as User screen - the previous slide).

TRANSITION - Next, we're going to learn about modifying your User Profile Preferences

Security: eVA eMail User Preferences



Preferences: Users request changes to their eMail Profile by accessing the Preferences Link on the black menu bar at the top of the Shop Now (eMail) Window

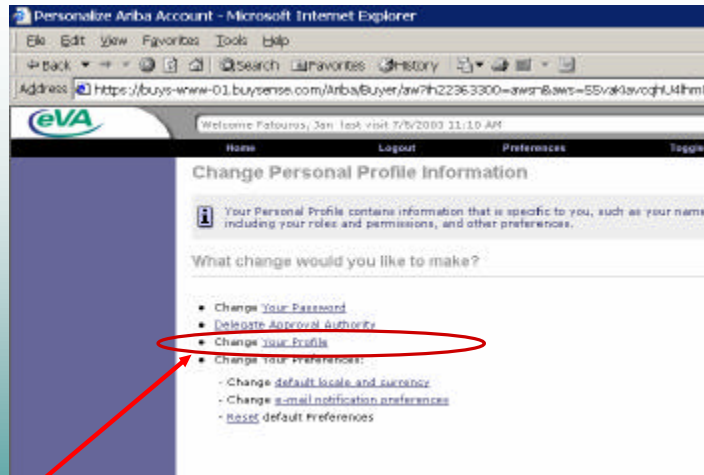
7/15/200304/27

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Again we need to move to the opening email screen. The Shop now (email) Swoosh screen. This screen is the first screen immediately following the ShopNow link. Select Preferences on the top Black menu bar

From this Preference Link the Change User Profile – link appears



Email Preference Options: *Change Your Profile* is selected

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Security- 86

Your Profile: This is the section that allows users to request changes to their workflow, roles, and purchasing limits. All profile change requests must be approved by the supervisor. In many cases the request must be approved by others. eVA security officers are inserted in the approval flow when roles are changed. Profile requests do not become effective until **fully approved**.

Security: eVA eMail User Profile



Welcome Fatouma, Jan. last visit: 7/5/2003 11:10 AM

Home Logout Preferences Toggle Tips Toggle Color

Personal Profile

- 1 Personal Info ✓
- 2 Account/Info
- 3 Justify Changes
- 4 Approval Plan
- Summary

1 Change Personal Profile Info

User Profile Update UP10002
Fatouma, Jan

1 Your Personal Profile contains information that is specific to you, including your accounting, shipping, and organization. ARIBA Buyer uses this information as default values whenever possible, to save you data-entry time.

Personal Profile Information - User Profile Update

1. Change your personal information:

Name: Fatouma, Jan
Agency: Department of General Services
Employee #: 14
E-mail Address: fatouma@dge.state.va.us
Phone #: 804-786-1819
Supervisor: Roberto, James T. [v]

2. Change your roles or permissions:

Roles:
eVA-Bat-Hier, A194 - Agency Security, A194-CC102,
A194-COMPSERV-R111, A194-ISC-DIRECTOR, A194-TRUCCOMMODIA-R111,
eVA - BuzzaneseOrgAdmin, eVA-Creative BuzzaneseOrg, eVA-Parson Order Status,
eVA-Querry All, eVA-Rpt-Global, eVA-Search Manager [v]

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This is the first of two User Profile screens. Notice we are on User Profile Change Step 1.

On this screen you may change Personal Information and User Roles.

You may not change Name (Name may only be changed by eVASecurity) or Agency (once a user ID is assigned to an agency it cannot be reassigned)

Employee Number: DO NOT PUT SOCIAL SECURITY NUMBER HERE. If you do –eVA security will delete it. For agencies that need to link User information to Entity systems – Use this field – Most Human Resource systems will have assigned a Position Number or an “dumb” Employee ID to identify the user.

Email Address may not be changed here – Users change their email address using the Portal Preference Screen.

Phone Number – The users phone number and any extension required to reach the user.

Supervisor – The supervisor must be an active eVA user. Remember our discussion some Entities have designated an eVA supervisor for all users. This could be the eVA Entity Security Officer of the Purchasing Director or eVA team lead in your organization.

Roles or Permissions: A role that begins with your agency code (for example A194) is an Entity defined workflow role. A role that begins with eVA is a Global role created by the eVA project team. Pay special attention to eVA roles – they grant data access or a function not assigned to all users. There is a list of eVA roles and a brief description of their purpose posted on the security page.

The “+” symbol next to a field indicates there is a list of valid values associated with the field. Click on the “+” to see the list. The “+” is called a “chooser” button.

When you reach the chooser list – you must do two things – find the role (you may need to enter part of the role name to find it) – Click on the “Add” button next to the role name. Click on the Remove button for any roles you want to remove. **THEN REMEMBER TO CLICK THE ‘OK’ BUTTON.**

Click the Next Button at the bottom of the screen or Step 2 Link on the Left Menu to move to the next

Security: eVA eMail User Profile



Accounting/changes: *Delegated Purchase Authority* must be approved by DPA Approver assigned to the *Buysense Org*
Expenditure Limit and *Expenditure Limit Approver* must be approved by the Expenditure Limit Approver
All other changes on this screen require only supervisor approval

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Users may change their **catalog controller** and **Buysense Org group** – with their supervisor's permission

Delegated Purchase Authority: Requires the approval of the DPA approver listed in the Buysense Org Profile. The delegation amount should be entered as one cent above the users maximum approval level. If the user may approve purchases that are 5,000 and below – the DPA amount should be 5000.01

Expenditure Limit: This is the amount the user may order without the Expenditure Limit Exceeded Approver approving the request. If you enter an Expenditure Limit you must also enter an Expenditure Limit Exceeded Approver. This approver may be an individual or a role.

Reminder: This is the only approval workflow that is attached specifically to the user. For users with Purchase cards – it is recommended that the User make themselves the Expenditure limit exceeded approver and the expenditure limit should be set to zero.

Ship to: These are pre-defined shipping addresses. This is the default address to be used whenever the user creates a requisition or a requisition is created on the users "behalf". Reminder: Shipping Addresses may be changed on the requisition.

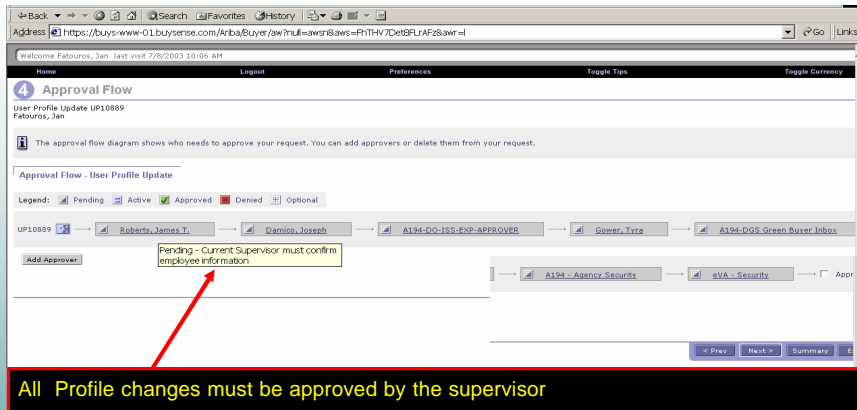
Deliver To: This is a text field. You should place the Users Name or if Central Receiving is being used – the exact location of central receiving. For large organization we suggest you use the Shipping Address to identify buildings and the Deliver To field to identify specific User, Floor, and Room within the building.

Again – deliver to may be changed on the requisition.

Click on the Next Button at the bottom of the screen to Enter a Justification for your changes. This is not required, but is very helpful to the approvers! If a user is requesting an eVA role – eVA security requires the eVA Entity Security officer to document why the change is requested.

Click on the Next Button again to see the Approval Flow required for your request.

Security: eVA eMail User Profile Workflow



All Profile changes must be approved by the supervisor
Supervisor changes must be approved by Old and New supervisor
Expenditure Supervisor changes must be approved by Old and New Exp Supervisor
Role changes must be approved by eVA Entity Security Officer & eVA Security

Hint: Mouse over the box – and the reason for approval appears!

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The approval tab displays the anticipated approval flow.

If you put your mouse over the approval box – a message telling you why the approver was inserted will be displayed.

For Roles – if you click on the approval box – a screen of all individuals assigned to the role will be displayed.

At this point you may add an Approver. These additional approvers are known as ad hoc approvers. Select the “add approver” button and follow the prompts to add an approver or a role. These approvers may be “outside” of your organization.

PLEASE NOTE: If you see an Ariba Systems approver – it means there is an error in workflow configuration. Possible causes include:

User Profile does not have a Buysense Org (select a Buysense Org on the second screen),
The DPA approver in the user's Buysense Org configuration is not defined (contact your DPS AE to correct the configuration). The supervisor no longer exists. If this is the case – you will need to work with eVA security to assign Supervisors active in eVA before using the on-line User Profile Option.

Security: eVA eMail User Profile Summary



of Changes - Microsoft Internet Explorer

Home Logout Preferences Toggle Tips Toggle Currency Help

Review Summary of Changes

User Profile Update UP10885
Fatouros, Jan

Review your user profile changes. Click **Submit** to submit them for approval.

Change	From	To
Delegated Purchase Authority: Expenditure Limit Exceeded Approver:	\$5,000.00USD A194-DO-ISS-EXP-APPROVER	\$10,000.00USD Gower, Tyra
Roles	eVA-Rpt-Hier, A194 - Agency Security, A194-CC102, A194-COMPSERV-8111, A194-ISS-DIRECTOR, A194-TELECOMMEDIA- 8311, eVA - BuysenseOrgAdmin, eVA-Create BuysenseOrg, eVA-Force Order Status, eVA-Query All, eVA-Rpt-Global, eVA-Search Manager	eVA-Rpt-Hier, A194-CC102, A194-COMPSERV-8111, A194-ISS-DIRECTOR, A194-TELECOMMEDIA-8311, eVA - BuysenseOrgAdmin, eVA-Create BuysenseOrg, eVA-Query All, eVA-Rpt-Global, eVA-Search Manager
Supervisor	Roberts, James T.	Damico, Joseph

The summary compares the current User Profile with the requested changes
Profiles become effective once they are fully approved!

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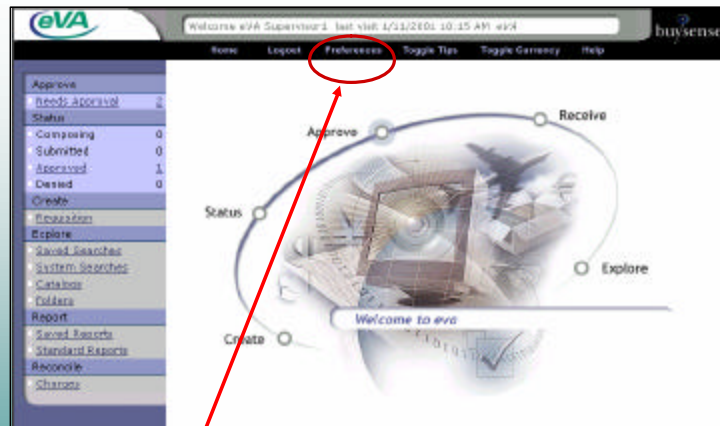
Notice – the Roles section provides you a complete list of the Before Change and the Requested Change list not just the differences. This means you need to manually match up the roles to know what has changed.

If all the information on this Summary Screen is correct – Click on the **Submit Button**.

Users may monitor the status of the Profile request – by viewing the approval flow tab by Clicking on the Submitted Link on the email Swoosh screen.

Now we will return to the eMail change preference screen to see how to manage email preferences.

Security: eVA eMail User Preferences



Preferences: Users request changes to their eMail Profile by accessing the Preferences Link on the black menu bar at the top of the Shop Now (eMail) Window

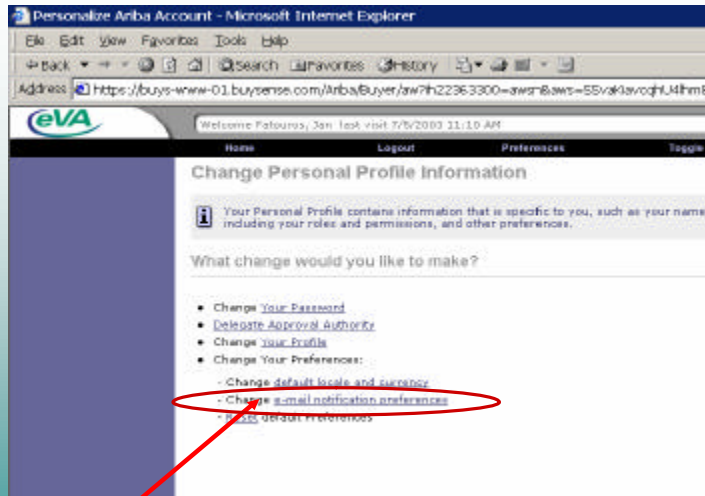
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Security- 91

Again we need to move to the opening email screen. The Shop now (email) Swoosh screen. This screen is the first screen immediately following the ShopNow link. Select Preferences on the top Black menu bar

From this Preference Link the Change eMail preferences – link appears



Email Preference Options: *Change e-mail notification preferences* is selected

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Security- 92

E-mail notification: This is the section that allows users to change without approval how they are notified about email events. Options range from turning everything off – to having a different notification configuration for every document workflow

Reminder: These changes are effective as soon as you submit the change

Note: If email does not behave as you intended – you may RESET the email notification back to the default configuration which is to be notified by email of all email events.

Approvals: E-Mail Notification Preferences

Welcome eVA Requestor1. Last visit 1/15/2001 1:38 AM

Home Logout Preferences Toggle Tip Toggle Currency Help

Set E-Mail Notification Preferences

Change your default preferences for the types of e-mail notifications you would like to receive, and the frequency of the notifications.

Change your e-mail notification preferences:

Default preferences for all document types

Default preferences for all document types:

Notification method:	Send e-mail immediately
When my document is approved:	<input checked="" type="checkbox"/> Send e-mail
When my document is fully approved:	<input checked="" type="checkbox"/> Send e-mail
When documents are awaiting my approval:	Send once
When my approval is overdue:	Send once

There are 5 types of notification preferences which you can set as you prefer

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REMINDER to access the SET E-Mail Notification Preferences screen, you click **Change e-mail notification preferences** on the Change Personal Profile Information screen.

eVA gives users the option to send an e-mail notification message whenever you become the active approver for a request that is in process. These can be sent in a batch (i.e. once a day) or individually.

eVA will also escalate requests after a certain number of days if no action has been taken.

Details about the various options that may be changed are in the User's Manual. The user's manual is published under Reports & Documents on the XXXX page. The email preference table that describes the e-mail notification preference options is on page XXX. Take a moment and have students find the pages in the manual.

Once you have set the Options for ALL or Individual Documents they become effective upon leaving the screen

Congratulations!

You've completed "Security Basic" Training

Good luck in learning more about eVA

If you need assistance . . .

-  **Contact your agency Purchasing Director**
-  **Contact your agency's DPS Account Exec**
-  **Send an email to evaSecurity@dgs.state.va.us**



***Delivering
high quality
cost effective
and timely service
to you . . .
our customer***

